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The International Magazine of Rendering

August 2019

The Future of Meat

Focus of European
renderers



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On the Cover

European renderers need to help present a clear and unified message on the sustainability and nutritional benefits of meat and its by-products.

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Renderitorial

Community, family, colleagues, associates, friends: whatever the name, these are important entities not only in life but also in business. Each rendering company is a community of individuals working toward the common goal of producing safe and beneficial commodities for feed, fuel, and other uses. Each associate provides their own unique expertise so the company is successful. This same rule applies to the rendering industry as a whole. When one of our colleagues passes away, the community grieves and reflects on what those friends brought to the table.

Last month, the rendering industry said goodbye to two individuals who had a large presence not only in their companies, but in the entire rendering community. A. Michael Koewler, or "Big Mike" as he was called, was not only president of his family's rendering company in Sacramento, California, but was also a leader for two industry associations, both regionally and nationally. His passion for his work was larger than life and he did not hesitate to speak the truth. At one meeting with state government officials during a heat wave that killed thousands of cows requiring disposal, he explained that some days his rendering plant smelled like Kentucky Fried Chicken, but do not expect that same pleasant odor during the dog days of summer. Big Mike will be deeply missed.

The other family member the industry lost last month was Marty Griffin, who was instrumental in developing new technologies and markets for rendered products. A quiet and private man, he also did not hesitate to educate those who needed to know the importance of rendering. Even as his family's business transitioned to a new public company ownership, Griffin remained steadfast in his commitment to the good of the industry. He and his talents will never be forgotten. More on both these instrumental men can be found on page 36 of this issue of *Render*.

While we mourn those who have passed, embrace the new colleagues and friends who bring fresh ideas and talents to a rendering community striving to continue to be successful. **R**

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Let the Green Games Begin

The media has already dubbed the November 2020 national elections as “Toxic 2020,” given the descent by both sides of the prospective presidential election ballot into using such strategies as racial identity allusions, xenophobia, and gender politics. Unfortunately, one major consequence is that cutting-edge issues about which people actually care, including environment/climate change, infrastructure investment, deficits, debt, and immigration reform, get only sound bites and passing mention as the press thrills to the name calling from both ends of Pennsylvania Avenue.

For rendering, the impending broad environmental debate—organic material recycling, biofuels, air quality, food waste mitigation, and water quality among others—brings distinct opportunities. As the “original recyclers” and an icon of sustainability, not only must the rendering industry ensure its services are part of the government array of programs to mitigate climate challenges that will inevitably emerge, but the cynics see the door kicked open to promote the commercial benefits of the industry broadly.

Politicians are only just awakening to the need to address, in some fashion, environmental challenges already forcing major shifts in the way agriculture and agribusiness operate. Call it climate change or global warming, or call it a sign of the apocalypse, but even politicians in Washington, DC, have figured out that an increasingly fickle Mother Nature cannot be ignored. Weather—not terrorists or hackers—has disrupted/destroyed roads, highways, railroads, airlines, barge lines, power grids, commuter systems, schools, and food production/processing, as well as the industries that rely upon these sectors.

In the last two years alone, record hurricane activity across the Caribbean and the southern United States (US) along with historic wildfires in California ravaged those areas. These disasters were trumped in March 2019 by a “bomb cyclone” that brought to the Midwest a blizzard carrying more than two feet of snow, followed by massive ice storms, hurricane-force winds, tornadoes, a record snow/ice melt, and inevitable multi-state flooding along the Missouri and Mississippi Rivers from which communities are still recovering.

The Department of Commerce’s National Centers for Environmental Information (NCEI) reports 2018 saw natural disaster damage hit \$91 billion, the fourth highest on record. For the first six months of 2019, natural disaster damage already exceeds \$6 billion, NCEI stated. By contrast, Congress approved and the president signed in June a \$19.1-billion supplemental spending bill to help make victims of the enumerated disasters economically whole.

How best to adapt to climate shifts, whether short or long term, is less hope for a control mechanism and more a distraction from independent private sector actions to mitigate climate change impacts and causes. (Several states are glomming onto complex carbon cap-and-trade programs, rejected in the 1990s, as a panacea for climate change and state budgeting shortfalls.) Politicians can debate for hours over where the fault for changing climate patterns may lie.

The facts of the matter argue creative long- and short-term strategies are needed, not rhetoric and finger pointing.

The first shot in this accelerating political war was fired in February, when Representative Alexandria Ocasio-Cortez (D-NY) and Senator Edward Markey (D-MA) introduced the “Green New Deal,” a five-page nonbinding resolution to yank the nation out of its alleged environmental tailspin. Nearly 100 House members endorse the plan at this writing, as well as a dozen Senators, four of whom are Democrats running for their party’s nomination for president.

“That (support) ensures that solutions to climate change will be a major issue in 2020,” according to finance website thebalance.com.

The plan, playing off President Theodore Roosevelt’s post-Depression New Deal for reinvigorating the US economy, includes the following seven goals, but summaries are very short on details as to how these goals will be achieved:

- Shift 100 percent of national power generation to renewable sources within 10 years, a goal called “wholly unrealistic” by most experts, especially since nuclear power is not allowed.
- Build a national energy-efficient “smart” grid, a laudable goal, but one that will take decades to achieve.
- Upgrade all buildings to become energy efficient. Again, admirable, but an expensive and long-term goal.
- “Decarbonize” manufacturing and agricultural industries. The plan’s summary talks about working with farmers on so-called “decarbonization,” but gives no details.
- Decarbonize, repair, and upgrade the nation’s infrastructure, especially transportation.
- Fund “massive investment in the drawdown and capture of greenhouse gases.”
- Adopting these goals would make “green” technology, industry, expertise, products, and services a major US export. “America could become an international leader in helping other countries transition to completely carbon-neutral economies,” say the bill’s sponsors.

The resolution requires any new federal infrastructure spending address climate change, with the government pushing for more zero-emissions vehicles and investing in high-speed rail and public transit. The poison pill for the resolution is its cost. The 10-year plan is massively expensive—conservative critics contend it carries a \$93-trillion price tag—and the respective political parties argue over the pain or gain the plan would afford low-income citizens when the plan addresses “income inequality.” The effects of climate change are worse on low-income people, supporters say (e.g., droughts cause food prices to rise and the poor cannot afford higher food prices).

The Green New Deal is increasingly unpopular even among liberal Democrats. It should be noted that House Speaker

Nancy Pelosi (D-CA), who created a “select” committee on climate change, effectively dismissed the Ocasio-Cortez plan when it was first unveiled. Senator Dianne Feinstein (D-CA) came out against the Markey Green New Deal on her side of Capitol Hill. Senate Majority Leader Mitch McConnell (R-KY) took the game a step further by bringing the resolution to the floor for a vote. When the inflamed rhetoric ended and the dust settled, 57 members voted nay, while 43 Senators—mostly Democrats—voted “present.” McConnell said they voted “present” so as not to be on record supporting the plan; Ocasio-Cortez said she and others urged the “present” vote because McConnell forced the vote without a hearing.

Yet like Lazarus, the Green New Deal—or “son of the Green New Deal”—is back from the political ash bin. In mid-July, Senator Bernie Sanders (I-VT), Representative Earl Blumenauer (D-OR), and Ocasio-Cortez jointly announced they intend to introduce in their respective chambers a resolution to define climate change as a national emergency that requires “massive-scale mobilization to halt, reverse, and address its consequences and causes.” That same week, House and Senate GOP lawmakers countered with the announcement of the Roosevelt Conservation Caucus, an effort to regain GOP control of the Capitol Hill environmental agenda, including climate change.

“I’m tired of playing defense on the environment,” said Senator Lindsey Graham (R-SC), chair of the Senate Judiciary Committee and co-chair of the new caucus. “We will win the solution debate, but the only way you’re going to win that debate is to admit you have a problem.” The new caucus will look at issues like clean energy technologies, invasive species, climate change, access to public lands, and related issues.

Graham says technology is the key to climate change remedies and dismissed such ideas as the Green New Deal as too cumbersome and way too expensive. “There’s not one Republican who’s going to vote for anything coming out of the Green New Deal ‘cause it’s crazy economics. We’re hoping we can find solutions that some Democrats will vote for, and if you don’t, you’ve done nothing but talk,” he said.

Meanwhile, the White House, having shifted 110 percent into reelection mode, has figured out those fly-over states forming the base of Trump’s support care about the real-world impact of Mother Nature. The administration orchestrated a mid-July event to allow Trump to tout his administration’s environmental progress. The speech caught most analysts off guard as green topics are not the president’s forte.

“We want the cleanest air, we want crystal clean water, and that’s what we’re doing and that’s what we’re working on so hard,” trumpeted Trump in a White House speech last month flanked by half a dozen cabinet officials, including Environmental Protection Agency (EPA) Administrator Andrew Wheeler and a handful of members of Congress.

The president broadly laid out his environmental successes. Presentations by Wheeler, Treasury Secretary Steve Mnuchin, Department of Interior Secretary David Bernhardt, Commerce Secretary Wilbur Ross, Secretary of Health and Human Services Secretary Alex Azar, Secretary of Transportation Elaine Chao, and chair of the Council of Environmental Quality Mary Neumayr all explained what the president was talking about. Cheerleading the event were Senators Kevin Cramer (R-ND), Steve Daines (R-MT), and John Barrasso (R-WY), chair of

Continued on page 23

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Feedstock Remains Oleofuels' Biggest Challenge

When stakeholders in European oleofuels (fuels derived from plant oils and animal fats) gather these days, talk turns immediately to feedstocks. This year's Oleofuels 2019 conference, organized by Active Communications International and held in June in Venice, Italy, was no exception. All attendees agreed the incoming updated European Union (EU) Renewable Energy Directive (RED II) offers encouragement to biodiesel, renewable diesel, and to advanced biofuels. In addition, RED II opens up particular opportunities for fuels produced from waste materials such as used cooking oil (UCO) and animal fats.



Conference discussions indicated it is unclear how the oleofuels industry is going to find the feedstocks to help meet the EU's targets for transport fuel supply. No one among the 160-plus conference participants—traders in biofuels and raw materials, renderers, EU biodiesel/renewable diesel producers, trade association officials, machinery and other technical service providers, fuel storage companies, non-governmental organizations involved in developing certification standards, and journalists—put forward a completely convincing case. In this respect, the debate has hardly changed in the past year.

Biorefinery Site Visit

The conference was preceded by a tour of the nearby ENI biorefinery. ENI has spent several years converting its existing fossil fuel refinery outside Venice into a facility for hydrotreated vegetable oil (HVO) production, the first time an existing refinery has been converted entirely to biofuel production in Europe. The plant has been running for five years using palm oil as the main feedstock. Two of ENI's five Italian refineries will be dedicated to oleofuel production once the Gela refinery in Sicily begins HVO production this summer.

Following this significant change in its refining approach, ENI explained that the Venice plant will phase out palm oil use over the next two years, although it is unclear what feedstocks will replace that oil. While the tour host explained UCO already provides 20 percent of feedstocks used, it was not stated how ENI would obtain sufficient quantities to substitute palm volumes in the future. Clearly other feedstocks will be needed, but nearly all mentioned—tallow, castor oil, palm fatty acid distillate, palm stearin, shea oil, sunflower and soya oils, and chemical/cosmetic industry residues—are limited in availability.

Finding Feedstocks

The ENI tour set the tone for the two-day conference. RED II clearly provides significant opportunities for oleofuels. Numerous speakers made the case for different feedstocks, but all admitted it will be difficult to find sufficient supplies of the right quality with the necessary certification of origin, quality, and sustainability.

Attendees would have benefited from an overview of the oleofuels market, including feedstock availability, but none was provided. Conversations around the conference hall suggested there is strong demand for such analysis. Perhaps the analysts did not want to put their heads on the chopping block as there are many uncertainties. For example:

- The future of palm oil as a feedstock. Not all agreed it should be completely phased out in the EU (or that it will be in the end).
- Whether existing and future suppliers of UCO will turn to methyl ester production, therefore not supplying the EU market with feedstock in the long term.
- The scope for EU countries to improve collection of UCO locally.
- The future development of co-processed renewable fuels and the impact this could have on existing oleofuels producers.
- The importance of blend walls in hindering oleofuel production development.
- Continued questions about how quickly advanced fuels based on cellulosic materials can be developed. Finland is leading the pack by introducing not only a 30 percent target for their transport energy use from renewable sources by 2030 (compared to the EU-wide 14 percent), but a separate 10 percent target for advanced fuels (i.e., cellulosic-based) by the same year.
- Whether novel feedstocks (i.e., brassica carinata grown on less productive agricultural land) can provide sufficient quantities of viable material.

Remarkable was the absence of any reference to algae, liquefied plastic waste, Pongamia, or Jatropha as solutions to the feedstock conundrum as all have been thought to be viable options in the past.

The Longer Term

While feedstocks may have dominated conference discussions, several speakers with an eye on the longer-term pointed out this issue will become less relevant in the future as internal combustion engines are phased out (one speaker said by 2040) in favor of electric or other modes. Replacing internal combustion engines is one thing, but fueling aviation and marine transport is another. Finding the biofuels of the future in these areas appears to be a serious challenge for the oleofuels sector.

Biofuel use in transport is largely driven by government policies. In the EU, there is already a move to focus more on greenhouse gas emissions reduction targets rather than biofuels mandates and double-counting, among others. Germany has already headed in this direction and others will likely follow. The feeling at the conference was this trend would probably continue, with more emphasis put on reduction of fossil fuel use and carbon capture. This does not mean the search for oleofuel feedstocks should end, but that the search might need to be redirected. **R**

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The Future of Meat

Focus of European renderers

By Bruce Ross, Ross Gordon Consultants SPRL

Nearly 500 individuals from around the rendering world traveled to the seaside resort of La Baule, France, to participate in this year's European Fat Processors and Renderers Association (EFPPRA) 2019 Congress in June. The French rendering association, SIFCO, organized the event, which was well-received by attendees.

EFPPRA President Sjors Beerendonk, Darling Ingredients Inc., and EFPPRA Technical Director Martin Alm set the tone at the start of each day of the congress. European Union (EU) policies related to rendering are at a standstill due to the May 2019 European Parliament elections and the forthcoming change in the composition of the European Commission and other EU leadership roles this fall. There has, therefore, been no progress on relaxation of the feed ban, initially to allow the use of pig processed animal proteins (PAPs) in poultry feeds, which will most likely not happen before the end of this year or in 2020. The European rendering industry is convinced these changes will happen—it is just a question of when. Anne Leboucher, animal by-products expert in the French Ministry of Agriculture, agreed with EFPPRA's assessment, but pointed out some minor changes to by-product rules that have occurred recently or are in the offing.

Meanwhile, European renderers face other challenges, most of which are linked to environmental sustainability. Over the next three to five years, the EU rendering industry will be heavily involved in the development of best available technology reference documents that will be used to assist in new rules for emissions, water use, energy efficiency, and other industrial parameters. EFPPRA is also taking part in the Food and Agriculture Organization (FAO) of the United Nations' Livestock Environmental Assessment and Performance (LEAP) Partnership, a research program aimed at assessing the sustainability burden along the meat production chain. A new fertilizer regulation just agreed to at EU level will need to be implemented by the member states. EU renderers, like others around the world, are contributing data on the industry's global footprint.

Long-term sustainability in the rendering industry is clearly a challenge. Hans Blonk of Blonk Consultants explained the

work he and others in the industry and academia are doing to develop life cycle analysis methodologies for the rendering industry.

The Great Meat Debate

Without livestock and meat production, there would be no rendering industry. Several congress speakers referred to a recent phenomenon that might be termed "meat bashing" that has been found on both sides of the Atlantic. Meat consumption is under various attacks, which clearly have implications for rendering. Global demand for animal proteins is forecast by FAO to rise significantly by 2030 and beyond, yet, as Beerendonk pointed out, all segments of the EU industry need to join forces to present a clear and unified message on the sustainability and nutritional benefits of meat and its by-products. EFPPRA has also been working with the World Wildlife Fund and others to seek common ground.

Other speakers weighed in on the issue. Blonk highlighted various myths and perceptions about eating meat, noting that interest in sustainable diets, such as the "Live Well" project in the United Kingdom, is having an impact on consumption patterns, both in quality and quantity. At the same time, the rendering sector is not entirely connected to feed as Thomas Grimm of Animox showed various other uses for rendered products, such as biopolymers, bioplastics, lactic acid fermentation, and oleochemical uses. René Laporte, an agronomist and zoo technician, defended the meat industry, stating that many new meat substitutes should be termed "fake meat" as it contains many preservatives and should not be confused with natural meat. Pascale Hebel of the French consumer society CREDOC did not attack meat-eating, but simply pointed to generational change and the fact that younger people, at least in France, associate meat with cancer and, in general, are more fearful of food safety risks. Perceptions need to be changed and transparency is a large part of the answer. Hebel did not refer to rendering in her presentation.

EFPPRA advocates for not just common messaging on animal by-products but also, where possible, common rules

for the industry to work toward, most notably following World Organization for Animal Health, or OIE, guidelines.

European Rendering Numbers

Dirk Dobbelaere, EFPRA secretary-general, gave his customary statistical snapshot of the European rendering industry. The highlights for 2018 and the first part of 2019 included:

- Pig production is increasing, especially in Poland and Spain, and pig/pig meat prices in early 2019 were 30 percent higher than the year before, albeit from a low base, influenced by African swine fever outbreaks and giving rise to fears that European consumption could be irreversibly damaged. Exports are booming, especially those to China and Vietnam.
- Poultry production is also doing well this year and is expected to exceed 2018's two percent increase, although the EU is also a major importer.
- Beef production continues to languish.
- There is a slight overall decline in rendered material, with category 3 and food grade down 12 percent from the previous year.
- Most category 1 and 2 products go to the energy sector (e.g., combustion and biodiesel), with some to fertilizer use.
- Pet food is the main destination for PAPs and food-grade proteins, with the market taking 1.75 million metric tons (67 percent) of those proteins.
- The fish feed market continues to grow. PAPs going to aquafeed rose 33 percent to 293,000 metric tons, which includes significant export quantities. Most is poultry and feather meal, although some pig PAP is now going into this market.
- Use of fats in fish feed also rose, by 440 percent in the case of category 3 and food-grade fat.
- Smaller/niche markets showed mixed results. For example, sales of food- and feed-grade proteins for fur feed fell 53 percent while equivalent fats rose 17 percent.
- Thirty percent of all EU PAPs is now exported outside the EU, the largest percentage being multi-species proteins.

Data show pet food is a major market for the European rendering industry and rendered products are important for the pet food industry, as explained by Phil Jones, procurement director for Nestlé Purina. He emphasized the need for trust, premium quality products, convenience, and competitive pricing in relationships with pet food manufacturers. Renderers can help by reducing the presence of foreign matter in raw materials, assisting in traceability, and providing innovative pet food ingredients. Dobbelaere's full report is on page 12.

Known Unknowns

The spread of African swine fever in China, and its limited appearance in the EU, is a major concern. The disease is out there yet no one knows when it will end and what the damage will be. Beerendonk explained that China has lost over 30 percent of its pigs (some figures put it at 40 percent but data are very unreliable). While China supplies 96 percent of its pig meat from domestic production, the remaining 4 percent represents 20 percent of global pig meat trade. There is a danger that other parts of Asia will be severely affected due to weak biosecurity and lack of rendering facilities (some countries have no rendering sector at all).

Another unknown factor is the future use of insect meal in the European feed sector. Dirk Sindermann of GEA Westfalia outlined the considerable potential for insects as an alternative source of protein. Mealworm and Black Soldier Fly larvae appear to be the insects of choice. They feed on food and other organic waste and produce at the rate of seven kilograms of feed to get one kilogram of larvae over a 25 to 35 day period. His view that this segment of the market is growing was underlined by the fact that SIFCO has welcomed its first member from among the insect meal providers, Ynsect. **R**



The 2019 EFPRA Congress was the swan song for Jean-Louis Hurel, chairman and chief executive officer of SARIA France and SIFCO president, who retired at the end of June. He has been heavily involved in EFPRA's work for many years.



Phil Jones of Nestlé Purina declared that rendered products are important for the pet food industry.

Mixed Results for European Rendered Products

Dirk Dobbelaere, secretary general of the European Fat Processors and Renderers Association (EFPRA), presented the annual statistics of Europe's animal by-products industry at the group's congress held mid-June in La Baule, France.

Pig production in the European Union (EU) is expected to increase slightly (0.6 percent) this year compared to 2018. The current high prices of pigs and pig meat (nearly 30 percent higher since January 1) is expected to continue in 2019 with prices influenced by Chinese import demand and provided no further EU member states are affected by African swine fever, which is the primary threat for the EU pig sector. Export data for the first few months of 2019 confirm the boost in export demand, in particular to China and other Asian markets. EU pig meat is currently the most competitive on the Chinese market given the still existing increased tariffs for United States pork exports.

Beef production in the 27 EU member countries is expected to drop nearly 2 percent this year with a continued slight decline in 2020. Prices and consumption, however, are expected to remain stable or slightly dip. Meanwhile, poultry output is forecasted to go up 2 percent in 2019 after a similar increase last year. This growth is being driven by a boost in production in Poland (more than 4 percent each in 2018 and 2019), France (over 3 percent this year), and Spain (an increase of 2.5 percent in 2019).

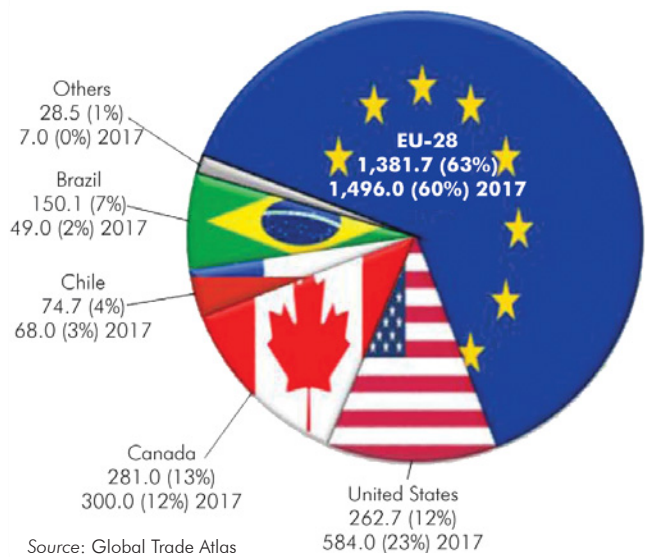
EFPRA represents 27 members in 25 European countries that reported processing over 17 million metric tons (MMT) of raw material in 2018 into 275 MMT of animal fats and nearly 4.0 MMT of animal proteins. In 2017, 3.0 MMT of fats and 4.5 MMT of proteins were produced from 20 MMT of raw material. Dobbelaere attributed the previous year's increase to more category 3 (animals fit for human consumption) and food waste material being processed.

Total category 3 raw material processed in 2018 was about 13 MMT, about the same as in 2016 after 2017's spike. Category 1 and 2 material collected remained stable at just over 5.0 MMT last year.

Total category 1 raw material processed in 2018, which is at the highest risk for transmissible spongiform encephalopathy, was 4.3 MMT, down 7 percent from 2017, while category 2 material collected, also at high risk but not containing some specified risk materials, was 530,000 MT, up slightly from the previous year. Most all category 1 meat and bone meal (1 MMT) and 105,000 MT of fat were used for combustion, with about 400,000 MT going to biodiesel last year, the same as in the past three years. Most category 2 meat and bone meal (167,000 MT, the same as in 2017) was used as fertilizer with a small amount (12,000 MT) going to feed for fur animals. Category 2 fat was mainly used in biodiesel, about 112,000 MT, with very little going to combustion.

Use of category 1 and 2 fats in biodiesel production in 2018 was up slightly to 520,000 MT from 500,000 MT in 2017 as their eligibility for double counting toward the EU Renewable Energy Directive targets remain in place until 2020. Even though category 3 fat does not qualify for double counting and its use in biodiesel increased from 200,000 MT in 2012 to 500,000 MT in 2017, only about 440,000 MT was used in 2018.

China pork imports, 2018 vs 2017 (000 metric tons)



Production of food-grade and category 3 fats last year was around 2.1 MMT, down from 2.4 MMT in 2017. Multi-species animal fat production accounts for more than half of all fats, followed by poultry/pig fats and lard. The primary destinations for multi-species animal fat in 2018 remained oleochemicals, animal feed, and biodiesel, while poultry fat went to pet food, animal feed, and some biodiesel. Pig fat last year was used in animal, oleochemicals, and an increasing amount in biodiesel.

Of the 2.6 MMT of food-grade and category 3 processed animal proteins (PAPs) produced in 2017 (down from 3.1 MMT in 2017), just under half is multi-species, nearly 30 percent poultry meal, 10 percent pig meal, and nearly 10 percent feather meal. Nearly three-quarters (1.75 MT) of PAPs went into pet food production last year, albeit down from 2.0 MT in 2018, while 540,000 MT was used for fertilizer, about the same as in 2017, and 293,000 went into fish feed, a growth of 33 percent over 2017. The European Commission in 2013 approved the use of swine and poultry PAPs in fish feed. Dobbelaere noted that poultry and feather meals are the primary proteins used for fish.

About 30 percent of EU rendered products, mostly proteins, is exported to "third countries," those not EU members. Of that, 64 percent is pig meal, 34 percent is feather meal, 27 percent is multispecies, and 24 percent is poultry meal.

Dobbelaere's conclusions for 2018 is that EU animal by-product processing dropped to 2016 levels, including 12 percent less category 3 and food materials. Exports of PAPs appears to be well established and an important factor for the EU industry as domestic food and feed-grade proteins usage declined 17 percent, with fertilizer seeing a 23 percent drop and pet food down 14 percent. Fish feed is the bright spot with its 33 percent increased usage of PAPs. As for food and feed-grade fats, feed usage declined 32 percent, food dropped 37 percent, and biodiesel was down 14 percent, although fat usage in fish feed is up 440 percent. There is stable usage of category 1 and 2 fats in biodiesel.

R

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Concern and Opportunities *on minds of Australian renderers*

By Michael Betar
Standard Commodities Australia Pty Ltd.

In 2018, Australia endured a serious drought that led to significant cattle and sheep slaughter. The lack of feed, escalating costs, live exports, and high kill rates resulted in national herd counts dropping significantly. The sector is now set to rebuild their numbers from historically low rates. This and other updates were heard at the Australian Renderers Association (ARA) 15th International Symposium where industry members from Down Under and around the world gathered to learn about “the bottom line” and what challenges, as well as opportunities, lie ahead. The symposium was held in Hobart, Tasmania, where participants woke to a daily view of the pristine port of Hobart, the finishing line of the famous Sydney to Hobart Annual Yacht Race covering 630 nautical miles that takes place between Christmas and New Year’s Day.

Despite buoyant markets, both domestic and (particularly) export, for the red meat sector that has enabled fairly solid tallow and animal protein production, the overall sentiment is one of concern for the industry over the next 18 to 24 months. Renderers will struggle with lower production rates as well as animal protein exports due to continuing exclusion from key markets. There is a swing toward pure species products for pet, aquaculture, and even monogastric consumers, leaving mixed species proteins harder to place on existing markets.

To kick-start the symposium, keynote speaker Fabien Hillairet, chief executive officer and founder of Greenea Europe, gave an insightful presentation on the global supply and demand of renewable biodiesel and the dynamic uplift in hydrotreated vegetable oil (HVO) manufacturing capacity. He made it clear that demand of up to 20 million metric tons could dramatically outstrip supply of the preferred “renewable” feedstocks of used cooking oil and tallow.

Exacerbating the imbalance is European directives banning the use of palm oil, now and in the near future, as well as eliminating use of oilseed crops for biodiesel production by 2030. Fabien illustrated the incredible profit margins of Neste, comparing them to tallow prices that have moved very little in real terms over the past few years. The new HVO capacity coming online may begin to challenge conventional supply

chains and allow innovation and opportunity for renderers to seek significantly better value for their fat through collaboration and by aggregating their tallow, a vital feedstock that will be fodder for these super refineries.

Kent Swisher, vice president, National Renderers Association (NRA) International Programs, gave a succinct run down on the supply and demand of animal proteins and fats, echoing Fabien’s views on low carbon fuel standards and the fact renewable feedstocks like tallow will achieve maximal returns over time. Poultry and red meat production in the United States (US) is projected to see an eight percent increase over the next decade, while Swisher estimated the major global animal fats and protein producing countries will churn out about 23 million metric tons of rendered products annually.

Global trade of animal proteins continued to grow at a brisk pace last year, by about 13 percent, to 3 million metric tons. Over the past eight years, trade of proteins has seen an 80 percent increase with Europe leading the charge, followed by the United States and Australia. Swisher pointed out the demand has mainly come from global animal feed industry growth at over one billion metric tons, in which the largest feed region is Asia at over 350 million metric tons. On the horizon, Swisher explained vegetable-based feed diets are a growing trend in the United States and Europe, while other issues, such as DNA testing, trade barriers, and the lack of acceptance of mixed species, are all creating havoc. Aquaculture, pet food, and “organic” fertilizers are creating opportunities for animal proteins.

An international panel that covered North and Latin Americas, Europe, and Australia/New Zealand held a highly useful session that canvassed key trends, latest news, and developments from around the world. NRA Chairman Ridley Bestwick, West Coast Reduction in Canada, gave an overview of the Canadian and US rendering situation. Biosecurity to biofuels and “big oil” to “liquid gold” were highlights of Bestwick’s revealing presentation.

Sjors Beerendonk of Darling Ingredients Europe highlighted the magnitude and reach of the European rendering sector,

the continuing advancement of biofuels, and the prospects for animal proteins to work their way back into monogastric feed. Importantly, Beerendonk explained the importance of social license and Darling's value system in identifying its commitment to "people, planet and profit," an interesting and thought-provoking perspective. Lucas Cypriano of the Brazilian renderers association gave an outline of Latin American growth and the promise and potential of this region. He made the audience aware of the recent trade agreement in the Latin Americas and the fact that, overall, the region is a net exporter of protein meals while a net importer of fats to help sustain a commitment to biofuel mandates.

In his last official engagement as a renderer, Bruce Rountree of SBT Group in New Zealand not only stole a few laughs from the morning audience but also gave a clear picture of the Australian/New Zealand rendering industry today and tomorrow. He drew attention to the challenges and trends as well as laid out the need for keeping an eye on quality in production and on export markets as vegetable proteins seem to be gaining more share in Australian/New Zealand feed diets.

An Australian panel followed, with George Schinard of Wilmar Gavilon focusing on market access and the fact that key export markets for rendered products are being lost. He pointed out that the single largest market for Australia, Indonesia, was virtually, without warning or anticipation, lost

in the dead of night. Schinard stressed the importance of market acceptance and that the industry must be far more vigilant, engaging, and aware of what is going on around it. Michelle Lange, president of the Pet Food Industry Association of Australia, stressed the importance of rigid quality control for animal proteins going into the pet food supply, a theme that resonates with all renderers who have enhanced their quality control standards over the past few years. Later in the symposium, Amy Parker of Elmira Pet Foods presented a precise account of what makes a great pet food company: commitment to quality, traceability, and a focus on service.

Ian Baker, chief executive officer of Biodiesel Industries Australia (one of a few biodiesel businesses remaining in the country) took symposium attendees through Australia's biodiesel history, the government's stop-start policymaking, and the frustration of a "voluntary" mandate. Damien Evans of the Colyer Fehr Group, a quintessential numbers guy, gave his perspective on the impact of the biodiesel industry with respect to change in the global trade patterns of fats and oils. Not that long ago, Australian and New Zealand tallow was heading in scores of directions around the world, packed in various forms, and used for oleochemicals, food, soap, feed, and industrial purposes, while today it seems all boats lead to Singapore for biodiesel.

Dr. Helen Crabb, veterinary epidemiologist at the University of Melbourne, took attendees through the state of play with respect to antimicrobial resistance (AMR). She shared a report into AMR that suggests an estimated 10 million people will die from AMR-related infections by 2050. Crabb explained the consequences to humans, such as the reduced ability to treat common ailments, increased exposure to infectious patients, and the economic burden of AMR. Accumulation of data on antimicrobial use is vitally important to ensure the right choices are made, in particular due to a long road ahead in understanding the complex epidemiological relationships between use and the emergence of or reduction in resistance. Crabb believes the initial work on the farm-to-food pathway identified the introduction of antimicrobial resistance to the food system. The challenge of the ongoing volume of work is vast, with an imperative to get ahead of the issue quickly in order to fast track important initiatives.

The symposium concluded with Julius Rath of Peerless declaring that these events are a great way to reconnect with old friends and colleagues, as well make new friends with whom to tackle challenges head-on and rise to the occasion to meet opportunities. He reminded attendees it is what one takes away from these events that is important, including the issues discussed in Hobart that were recurring themes of cleanliness, purity, and energy management, along with opportunities in biofuels, pet food, and niche aquaculture sectors.

R



Photo by Bill Spooncer

Fabien Hillairet, Greenea Europe, provided an update on the global supply and demand of renewable biodiesel and hydrotreated vegetable oil.

Collaboration

Proves Successful

By Heather Davis
Coordinator of Member Relations and Operations
National Renderers Association

The National Renderers Association (NRA) Central Region held its annual business meeting in June in Minneapolis, Minnesota, following the Animal Protein Producers Industry (APPI) *Rendering Code of Practice* training to drive attendance to both events. The format change created opportunities for NRA members to network while obtaining Food Safety Modernization Act preventive control qualified individual training as well as attend informational presentations. The Central Region meeting had a record attendance, with a 30 percent increase over previous years. The group's 2020 meeting will again be held in Minneapolis in conjunction with the APPI training.

Mike Karman, Sanimax, wrapped up his tenure at the meeting as Central Region president. Officers serve a six-year term: two years each as secretary, vice president, and president. Jason Hartman, Mendota Agri-Products, was elected the region's new president, Tom Beseman, Central Bi-Products, was voted in as vice president, and Robert Kaluzny, Kaluzny Bros., was welcomed as secretary. Under Karman's leadership, the Central Region has grown in members and engagement, and he was recognized for his contributions.

The meeting's featured speakers on topics such as renderers' contributions to anti-terrorism, the changing job market, leading with conviction, and NRA's membership program. Aaron Morningstar from the Department of Homeland Security introduced attendees to the Chemical Facility Anti-Terrorism Standards (CFATS) regulatory program. The program tracks over 300 chemicals that could be diverted for use in terrorist activities, including some used by renderers for cleaning, refrigeration, wastewater treatment, and oxidization. The program follows a risk-based approach. Once a risk assessment is done, Homeland Security works with companies deemed "high risk" to develop a security plan that complies with legal safety standards and needs of the location being secured. More information about the CFATS program can be found on page 30 in this issue of *Render*.

Tim O'Neill from the Minnesota Department of Workforce gave a labor market update. Minnesota is experiencing a labor shortage across all occupational sectors, especially those paying entry-level wages. Employment openings are likely to increase faster than workers are available, so O'Neill recommended companies hire older individuals and for high school graduates to look into associate degrees and trade certificates instead of four-year colleges. While his report was largely focused on Minnesota, the information presented was similar to expectations in other Midwestern states, where many renderer attendees are located.



New NRA Central Region officers are (from left), Robert Kaluzny, Kaluzny Bros., secretary; Tom Beseman, Central Bi-Products, vice president; and Jason Hartman, Mendota Agri-Products, president.

Lest anyone say that a rendering meeting becomes oversaturated with charts and data, the Central Region meeting featured the enthusiastic Scott Savor, owner of Uncommon Competitor. Savor is a professional speaker and leadership coach, and taught motivational practices for good leadership while shaking up the room. He encouraged leaders to triple the number of questions they ask every day and reward good behavior within five seconds (i.e., with a handshake, high five, or verbal acknowledgment). When giving praise, use clarity, conviction, and creativity for positive execution.

Anna Wilkinson, director of NRA Communications, opened the second day of the meeting with information on NRA's upcoming name change to the North American Renderers Association (NARA). This rebranding will help the organization be more uniquely visible in internet search results. She also discussed the value of educating the public about rendering and the importance of messaging in communications: "Shout the positive, whisper the negative, but list everything for 100 percent transparency." Wilkinson is focused on tailoring positive messages about rendering to consumers and the community, and is excited to unveil the association's new website in October.

John Hausladen, president of the Minnesota Trucking Association, noted that large trucks move approximately 80 percent of all cargo in the United States, but the industry's driver shortage is expected to continue. Minnesota is piloting a new driver training and recruitment program that shows promise. On the vehicle side, new technology is being integrated, resulting in fewer crashes and partially automating the driving process. While Budweiser successfully completed

its first completely self-driven beer delivery, driving automation is more likely to change the role of drivers, not replace them entirely.

In addition to an update on regulatory work and food safety issues, Dr. David Meeker, NRA senior vice president, described several upcoming research projects. He encouraged renderers to tell their story and stay positive about the environmental, industrial, and animal nutrition benefits of by-products. To do that, NRA is spearheading a rendering and a pet food ingredient study to provide metrics on greenhouse gases avoided, water recycled, people employed, used cooking oil collected, raw material types, market value of products, the value of rendering to animal production, and other impacts of rendering.

A tabletop reception was held the first evening of the meeting so as to include APPI attendees. The reception featured booths from NRA associate and allied members, providing opportunities to talk to renderers and colleagues in an informal setting. **R**

August

4th Annual Canadian Beef Industry Conference

August 13–15, Calgary, AB, Canada • www.canadianbeefindustryconference.com

September

US Hide, Skin, and Leather Association 40th Annual Meeting

September 19–20, Chicago, IL • www.ushsla.org

2019 Feed and Pet Food Joint Conference

September 30–October 2, Kansas City, MO • www.ngfa.org

October

Poultry Protein and Fat Seminar

October 3–4, Nashville, TN • www.uspoultry.org

American Fats and Oils Association Annual Meeting

October 16–17, Chicago, IL • www.fatsandoils.org

National Renderers Association 86th Annual Convention

October 28–November 1, Carlsbad, CA • www.nationalrenderers.org

Visit www.rendermagazine.com for a complete updated list of industry events.

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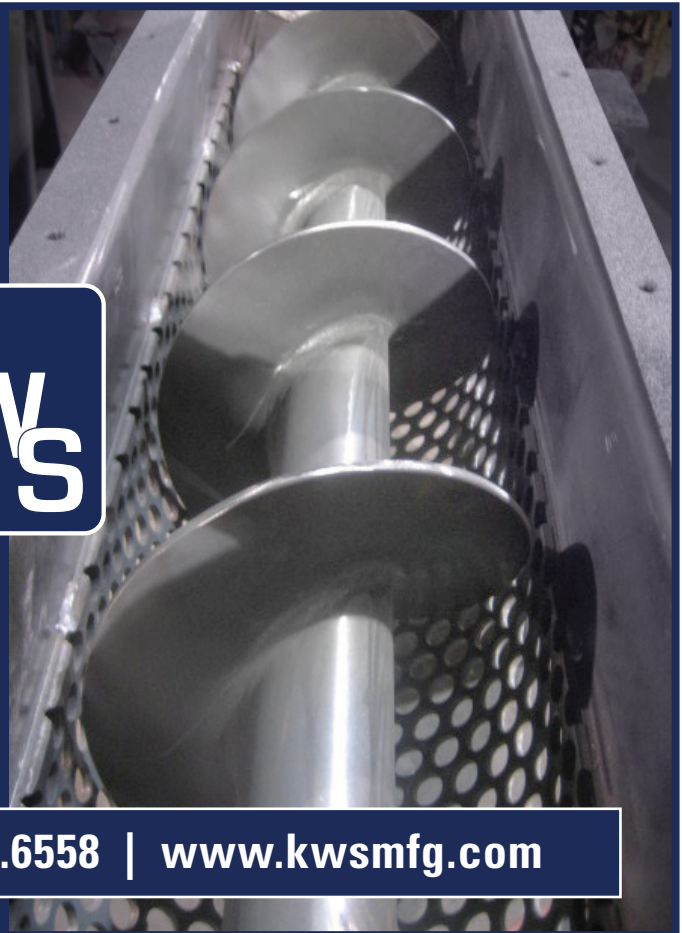
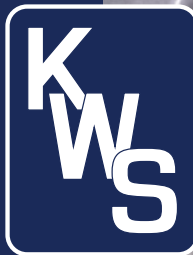
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Ensuring Optimal Health for All

The World Renderers Organization (WRO) named this author, Dr. Martin Alm of Germany, and technical director of the European Fat Processors and Renderers Association (EFPRA), its president for the next two years at the WRO general assembly in La Baule, France, held during the EFPRA Congress 2019. In his final speech, outgoing WRO President Fernando Mendizabal of Mexico presented a look back over his two-year term, during which he had three main objectives:

- To build a digital future for WRO on a cloud-based platform, which he accomplished, that can easily be used by future officers; moreover, he agreed to maintain the WRO website.
- To represent the global rendering industry at important world meetings.
- To bring WRO into the Food and Agriculture Organization's Livestock Environmental Assessment and Performance program where models to measure sustainability of food and feed industries are being developed. Even if renderers might not have a direct benefit today from these calculations, it is important to participate in the rulemaking process instead of being regulated by others.

A fourth objective emerged later, which was to update the WRO by-laws at the request of New Zealand renderers. This project will be finalized in the coming year.

Mendizabal suggested that permanent representative in Europe would enable WRO to have a consistent, known person who could build long-term relationships with individuals in European organizations to promote the interests of rendering. In closing, he pointed to the "grey-haired participants," urging WRO to embrace the next generation of renderers and involve them more in the international arena. WRO, he said, is too important to die out with its founders. WRO thanks Mendizabal for his two years of service as WRO president.

Along with Alm being appointed WRO president, Lucas Cypriano of Brazil and Doyle Leefers of the United States were elected as first and second vice presidents, respectively. Bruce Rountree of New Zealand stepped down after serving a two-year term as second vice president due to his recent retirement.

OIE General Assembly

The 87th General Session of the World Assembly of National Delegates of the World Organization for Animal Health (OIE) held late May in Paris, France, brought together representatives of 182 OIE members and observers from international organizations that have signed an official agreement with OIE, of which WRO is one. In one panel, the cooperation of different international bodies was discussed. The Organization for Economic Cooperation and Development pointed out that many decisions are not evidence-driven but rather are simply political, and recommended cross-government coordination. Information collected should be used, but it is crucial that the quality of the statistical data be reliable. Another challenge is the varied quality of data received from



WRO leadership is (*from left*) Lucas Cypriano, Brazil, first vice president; Fernando Mendizabal, Mexico, past president; and Dr. Martin Alm, Germany, president.

many institutions, research groups, universities, and other organizations that requires a steering group for compilation and coordination to receive high-quality standard information.

The World Bank stressed the relationship between economic data and animal health. The well-known phrase "prevention is better than cure" is not bank language and must be translated so the consequences of disease is understood and translated to economic impacts. African swine fever (ASF), for example, is not only an animal disease as an outbreak could affect many sectors and economies. Livestock production is at risk due to export bans and other trade issues, so data on diseases and their impacts would be an important step toward steering investments in the right direction. In this regard, it was mentioned that 57 percent of the immediate OIE reports focused on four diseases: high pathogenic avian influenza, ASF, foot and mouth disease, and blue tongue.

Another focus at the OIE assembly was the strategic challenges to global ASF controls. Notifications have been reported from Africa, Asia, and Europe. From 24 genotypes, only two were found outside of Africa, but its threat to the global pork industry, estimated at \$39.2 billion (US), could be tremendous. Pork has the highest worldwide consumption rate of terrestrial animals at 37 percent, and global demand is still growing with an increasing population. ASF could have collateral damage to all livestock farmers and processors, if not the whole agricultural sector if the feed industry is included. A simple comparison of production systems revealed this challenge: intensive farming has high biosecurity and produces good quality products; however, extensive farming, mainly backyard farming, has poor disease awareness but is responsible for 43 percent of pigs produced.

Besides the aforementioned diseases that are spread through migration and movement of animals and animal products, other means of infection are vector-borne diseases like West Nile virus or Riff Valley fever. Fighting all diseases is common sense. The overall approach is the "one world—one health" concept, which acknowledges that humans, animals, and the environment are inextricably linked and that each needs equal attention to ensure optimal health for all. **R**



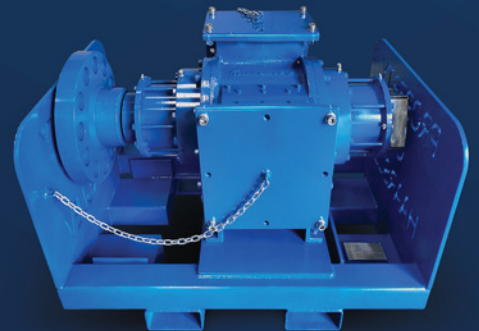
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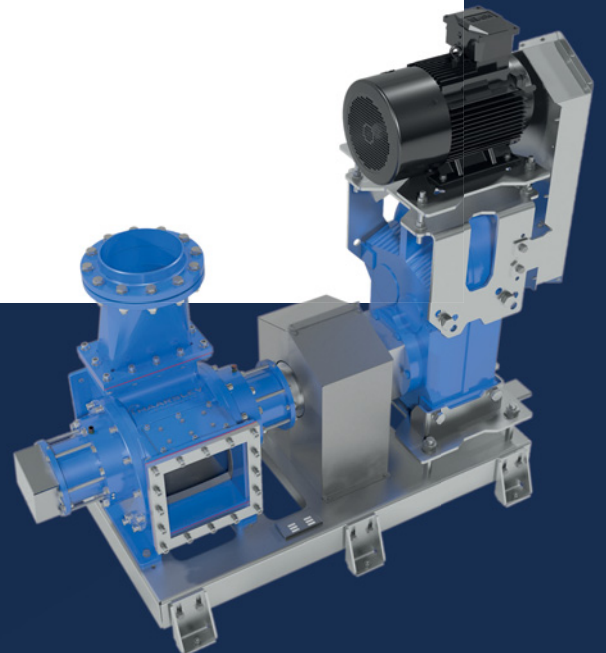
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Renderers Speak Up in Washington

Renderers from across the United States (US) met recently in Washington, DC, to advocate in Congress for decisions that recognize the value renderers contribute to agriculture, consumers, and the environment. Each year, the National Renderers Association (NRA) hosts their annual Washington, DC, Fly-in to provide renderers the opportunity to take their voice to Capitol Hill on important issues directly affecting their businesses.

Congress is facing decisions on numerous bills that will affect the rendering industry, including international trade, transportation, biodiesel, the Green New Deal with its focus on global climate change, and other environmental matters. Renderers centered their focus on issues most important to their businesses to discuss with their senators and representatives. They held almost 180 meetings on Capitol Hill. Congressional response was positive to rendering's sustainability and the importance of the industry for animal feed, consumer and industry products, and biofuels.

"Given the turnover on the Hill, not just in congressmen but also staffers, it is ever more important for us to get our message out about who we are, the essential services we provide, and just how green we are in doing it," said Dave Kaluzny II, chairman of NRA's Legislative Action Committee. "They need to know us!"

To educate Congress about the industry, renderers explained that their businesses generate \$10 billion in economic activity each year, as well as thousands of full-time jobs with benefits across the country, often in rural areas. Since many members of Congress and their advisors are not from agriculture, renderers used this and other information from NRA's "10 Facts about Rendering" as a springboard to explain the industry (see page 22).

NRA's priority policy issues for this year's fly-in were selected by the association's Legislative Action Committee at the spring board meeting. They focused on expanding market opportunities for the rendering industry and improving operating conditions. Top issues were:

Biofuel tax credits—Support congressional extension of the expired biodiesel tax credits to promote continued growth in the young biofuels industry. Renew the expired alternative fuel mixture credit.

- Support House of Representatives (H.R.) bill 3301, approved by the House Ways and Means Committee, to extend the tax credits for 2018, 2019, and 2020. Cosponsor H.R. 2089 introduced by Representative Abby Finkenauer (D-IA) with Representative Mike Kelly (R-PA) to extend the biodiesel and renewable diesel tax incentives for 2018 and 2019. The Senate is ready to consider biodiesel tax legislation once approved by the House.

Exports—Overseas markets are essential with 18 percent of US rendered production exported last year.

- Support passage of the United States-Mexico-Canada Agreement to help restore \$30 million in lost trade



Representative Gary Palmer (R-AL, center) met with Micah Salsman (left) and Michael Glenn of BHT Resources.

to Mexico by regaining market access for US bovine meat and bone meal.

- Support \$255 million in appropriations for the new Agricultural Trade Promotion and Facilitation program in the 2018 farm bill. This will provide full funding next year for the important Market Access Program and Foreign Market Development program that help fund NRA international activities.
- Renderers seek access for US tallow denied entry to the European Union due to a nontariff trade barrier unsupported by science (\$200 million potential new market).

Transportation and infrastructure—Support improvements to modernize and expand US surface transportation, including roads, highways, bridges, and ports.

- Urge passage of the Modern, Clean, and Safe Trucks Act of 2019 (Senate bill 1839, H.R. 2381). Identical bills in the Senate and House would repeal the 12 percent excise tax on the retail sale of heavy trucks and trailers to encourage new, safer, and cleaner fuel-efficient vehicles.
- Increase the allowed maximum interstate weight limits for trucks to move more volume in a safe and efficient way. Safety technology has advanced considerably since the current 80,000 pound federal weight limit took effect in 1982.

Sustainability—Rendering is sustainable since it "upcycles" organics and carbon into new ingredients for livestock feed, biofuel, and consumer and industrial products. Renderers:

- produce safe animal food
- practice environmental stewardship by
 - ◇ contributing 28 percent of biofuel feedstock
 - ◇ sequestering five times more carbon emissions than they produce each year (equivalent to removing 12 million cars annually from the road)

- ◇ returning over five billion gallons of clean water to rivers and streams each year (equal to 16 gallons per person)
- care for their community and employees
- recycle to help feed a hungry world
- provide vital nutrition to produce healthy livestock, poultry, and fish for people to eat.

This year's fly-in also featured an industry issues briefing with leading experts on topics affecting the future of rendering. Prospects for livestock and poultry, biodiesel, the farm bill, export trade, and transportation were discussed. Renderers heard the latest agricultural economic outlook from Warren Preston, the US Department of Agriculture's (USDA's) deputy chief economist, and current political intelligence on biodiesel tax credits from Kurt Kovarik, senior lobbyist for the National Biodiesel Board. Greg Ibach, USDA undersecretary for marketing and regulatory programs, spoke about the livestock disease preparedness provisions of the 2018 farm bill, biotechnology, and the pending federal small ruminant rule. Export challenges with China were addressed by international trade expert Bill Westman of the North American Meat Institute. Randy Gordon, president of the National Grain and Feed Association, also talked about what is being done to resolve rail transportation problems.

Mark your calendar for next year's NRA Washington, DC, Fly-in, scheduled for June 15–17, 2020. All NRA members actively involved in rendering are invited to attend. Renderers have a compelling story to tell and keep telling. Together we are being heard and making an impact. **R**

USDA Chief Vet Meets with Renderers on ASF

The threat of an outbreak of African swine fever (ASF) has galvanized the US pork industry and its marketing chain to coordinate preparedness plans with USDA's Animal and Plant Health Inspection Service (APHIS) and other stakeholders. During NRA's fly-in, Dr. Jack Shere, DVM, the nation's chief veterinary officer and administrator of USDA's Veterinary Services at the time, discussed options for disposal of diseased animals if ASF is discovered in the United States.



Dr. Jack Shere

Shere stressed the importance of having an ongoing dialogue with the pork and rendering industries to develop biosecurity plans, including disposal options, before a potential ASF outbreak occurs. Animals that have died from disease can be treated in various ways to prevent spread of the disease. Shere's goal is to ensure these animals are disposed of rapidly in an efficient, feasible, and environmentally-responsible manner. He explained the key role of state veterinarians and APHIS is to establish control (or exclusion) zones if needed to contain the spread of the virus. Renderers had a constructive discussion with Shere about the importance of maintaining markets and customer confidence here and abroad. **R**

A Rendering Leader on Capitol Hill

By Nancy Foster, President, National Renderers Association

Jim Andreoli Jr. retired recently from Baker Commodities Inc. after more than 15 years of advocating for rendering during the National Renderers Association's (NRA's) annual Washington DC, Fly-ins. Working for his family's business from a young age, Andreoli was a pioneer for the industry on Capitol Hill. With his passion for rendering, he relentlessly and successfully built support for the industry among Republicans, Democrats, conservatives, and liberals alike. For Andreoli, it was about what was best for the overall industry.

Each year, Andreoli would bring Baker's general managers to the fly-in to meet with members of Congress from the multiple states where the company's operations were located. He and Terry Wigglesworth, Baker's lobbyist, coached these general managers extensively before the conference through calls and in-person meetings. Each manager learned to describe the value of rendering, the hard work it demands,



Jim Andreoli Jr. (*right*) meets with Representative Devin Nunes (R-CA) during NRA's Washington, DC, Fly-in.

and its environmental sustainability benefits. They also learned to explain the impact of NRA's priority legislative issues on their operations, such as biodiesel, food waste, transportation, or other legislation.

Andreoli's commitment to making genuine personal connections helped make Baker's meetings on Capital Hill impactful, and especially memorable, year-after-year for the congressional members they met with. Many supported making rendered animal fats and used cooking oil eligible for biodiesel tax credits and other bills helpful to the rendering industry.

Thank you, Jim, for your passion and contribution to the rendering industry. As you work in your vineyard raising the Cabernet Franc grapes that you and your wife, Patricia, make into wine, please know that the industry will be working to carry your legacy forward on Capitol Hill. **R**

Milestone in Taiwanese Market

The Taiwanese market for non-ruminant animal proteins from the United States (US) opened in January 2019 after a three-year joint effort between the National Renderers Association (NRA), the US Department of Agriculture's (USDA) Animal and Plant Health Inspection Service (APHIS) and Foreign Agricultural Service, and Taiwan government authorities. These endeavors involved lengthy negotiations between the United States and Taiwan and a rigorous audit of the US system by Taiwanese inspectors in 2018. In June, NRA hosted a workshop and celebration of the market opening in Taipei, Taiwan, with over 70 attendees from across Taiwan's feed industry. NRA recognized APHIS' Russel Caplan and Dr. Yen-Chi Chen for their efforts and many years of service.

The current market for poultry by-product meal to Taiwan for aquaculture and pet food is around 60,000 metric tons per year, while the demand for porcine meat and bone meal in livestock feed and pet food is estimated at 100,000 metric tons annually. As of June 2019, eight US plants had been approved for export. Taiwan will become an important export market for US rendered products in the foreseeable future. **R**



Kevin Baker (*left*), Valley Proteins Inc., and Tu Wen Jane, deputy director general of Taiwan's Bureau of Animal and Plant Health Inspection and Quarantine, commemorate the re-opening of the Taiwanese market.

10 Facts about Rendering

1. **Rendering is Recycling**—Rendering is the cooking and drying of meat and/or other animal by-products not used for human consumption in order to recover fats and proteins.
2. **The US rendering industry accounts for \$10 billion in annual economic activity** across the country, including rural America.
3. **The Surprise Contributions of Rendering**—People use rendered products every day in soaps, paints, varnishes, cosmetics, pharmaceuticals, shaving cream, deodorant, crayons, leather (i.e., handbags, car seats, furniture), lubricants, caulking compounds, candles, cleaners, paints, perfumes, polishes, rubber products, plastics, fertilizers, and even explosives. Many people do not realize this.
4. **Good for Animal Health**—Rendering produces valuable fats and proteins that improve nutrition in foods used by consumers and farmers to feed their pets as well as livestock, poultry, and fish.
5. **Recycling from Restaurants**—Renderers collect the nation's used restaurant cooking oils to clean and recycle into ingredients for animal feed and to be used in biodiesel and renewable diesel for cars, trucks, airplanes, and other equipment.
6. **Rendering is Green and Sustainable**—All US landfills would be full in four years without rendering, posing a serious public health threat. Upcycling of animal by-products sequesters at least five times as many greenhouse gas emissions as it emits. Rendering yields far fewer emissions than landfilling or composting. Rendered products help animal agriculture and other customers reduce their environmental footprints and become more sustainable.
7. **Clean and Safe**—High cooking temperatures used in rendering ensure animal food and consumer protections against bacteria, viruses, and other safety hazards. Meeting customer needs for quality and safety is a high priority.
8. **Consumers have Confidence**—Renderers comply with all applicable federal, state, and local laws and regulations. They conduct hazard analyses, control food safety hazards, and use good manufacturing practices in their *Rendering Code of Practice* stewardship program. This *Code of Practice* fully complies with the Food and Drug Administration's animal food safety rules under the Food Safety Modernization Act.
9. **Volume In, Quality Out**—Rendering is a high-volume, high-tech industry. US renderers collect 56 billion pounds of raw materials a year and recycle them by cooking and drying into 22 billion pounds of animal fats/oils and proteins each year.
10. **Skilled Workforce**—Rendering plants have extensively trained workers who use high-tech controls to operate ultra-hot temperature cookers, centrifuges, and presses. Renderers have a high labor retention rate.

R

www.nationalrenderers.org



the Senate Environment and Public Works Committee. Also present was Representative Bruce Westerman (R-AR), an ag engineer and member of the Natural Resources Committee.

Trump said his administration is using “technologies and processes” to clean up energy production and water sources, adding that the United States leads the world in reducing greenhouse gas (GHG) emissions and underscoring the president’s vow to either renegotiate or withdraw from the 2016 Paris Climate Agreement, now signed by 195 nations. In 2017, Trump announced his intention to withdraw the United States from the pact saying the nation bears a disproportionate responsibility for GHG reductions while countries like China and India are getting a GHG reduction pass. As part of the negotiating process, former President Barack Obama committed to curtailing US carbon dioxide (CO₂) emissions by 26-28 percent of 2005 levels by 2025. There is no formula on how a nation meets its goals and there is no penalty if a country misses its mark. The earliest the United States can withdraw from the agreement, however, is November 2020, just after the general election.

In his July speech, Trump was Trumpian. Interjecting political jabs at Democrats and other critics as he boasted of his administration’s achievements, the president said his administration “does not have to sacrifice jobs to lead the world on the environment,” another shot at the Green New Deal.

“From 1970 to 2018, US criteria air pollution fell 74 percent, while the economy grew by 275 percent,” said EPA’s Wheeler when he took the podium. “Under your administration,” he said of his boss, “emissions of all the criteria air pollutants continue to decline. For example, lead and sulfur dioxide levels have dropped by double-digit percentages over the last two years.” He touted methane reductions from natural gas extraction despite an increase in US natural gas production.

Wheeler and the president were slammed by environmental groups for using reduction percentages reflecting nearly the entire history of regulation by EPA to show progress. Before, during, and after the White House enviro pep rally, environmental groups and unfriendly media took the president to task, blasting out “fact checked” versions of Trump’s claims on his environmental protections.

“We’re not taking credit for what happened before, but we’re acknowledging it,” Wheeler commented. “I think the American public needs to understand, if they listen to the news every night they would think the air’s gotten worse over the last 49 years, when, in fact, it’s gotten better.” The Sierra Club accuses Trump of “greenhouse gaslighting the public to try and cover up the fact he is the worst president in history for the environment.”

“The Trump administration has sought to roll back 83 environmental and public health rules since coming into office,” the nearly 130-year-old environmental group said in a statement. “Nearly a quarter of those—22—have to do with air quality or carbon emissions; seven are related to water quality.”

The White House rally also served as damage control after the Capitol Hill news service *Politico* reported in June that the US Department of Agriculture (USDA) is officially ignoring its own climate change studies and data. It followed that report with another one alleging “threats of retaliation” against

economists and others who do not produce climate analyses that jive with Trump administration priorities.

There’s nothing like suppression and threats against bureaucrats to whet the political appetite of an opposition lawmaker, particularly going into a national election. When *Politico*’s story first ran, it inspired 17 Democrat Senators to not only put the White House on notice of their unhappiness, but to demand USDA’s inspector general (IG) investigate the two claims. USDA stated there are no directives discouraging the release of department climate change research. “Research continues on these subjects and we promote the research once researchers are ready to announce the findings through appropriate review and clearances,” the department commented in response to the *Politico* story. “USDA has several thousand scientists and over 100,000 employees who work on myriad topics and issues; not every single finding or piece of work solicits a government press release.”

Senator Debbie Stabenow (D-MI), ranking member of the Senate Agriculture Committee, sent a letter to Agriculture Secretary Sonny Perdue about the news service’s report. Calling the report “outrageous,” she demanded a “thorough explanation.” Stabenow said, “It would be deeply irresponsible for the department to suppress research that helps USDA customers and the agriculture economy as a whole.” Stabenow was lead among the 17 signatures on the letter to the IG requesting the office “look into potential instances of suppression and alteration of scientific reports, documents, or communications” produced by the ag department. Legislators also want to know about any instances of retaliation and “political decision-making” coloring the production of other reports that have cast Trump administration policies on other issues, including trade and taxes, in a negative context.

White House hopeful and Senate Agriculture Committee member Senator Amy Klobuchar (D-MN) wrote her own letter to Perdue about her “deep concern and alarm.” Signing on to Stabenow’s letter to USDA’s IG were other Democrat presidential wannabes, including ag committee member Senator Kirsten Gillebrand (D-NY), and Senators Cory Booker (D-NJ) and Kamala Harris (D-CA). Senator Michael Bennet (D-CO) sent his own letter.

The original *Politico* story reported that Agricultural Research Service (ARS) scientists are putting out studies with warnings about the broad effects of climate change on various aspects of crop and livestock production and related industries, but these reports are not communicated to the public. “The administration, researchers said, appears to be trying to limit the circulation of evidence of climate change and avoid press coverage that may raise questions about the administration’s stance on the issue,” *Politico* reported.

In a letter in early July, USDA officials let their technicians know the following: “[We want] to reiterate that USDA has no policy, practice, nor intent to minimize, discredit, de-emphasize, or otherwise influence the climate-related science carried out by USDA scientists and agencies. Scientific integrity is of paramount importance in USDA.”

Wrapped into the Capitol Hill tug of war and the White House enviro victory lap is the continuing battle over the Renewable Fuel Standard (see “Biofuels Bulletin” on page 24). Tack on a likely reemergence of some proposal or other to predicate any climate change/environmental “solution” to a cap-and-trade plan. Let the green games begin. **R**

US Government Continues to Undermine Biofuels

The United States (US) Department of Commerce (DOC) issued a preliminary decision in early July that would nearly eliminate countervailing duties on biodiesel imports from Argentina. DOC has been conducting a “changed circumstances” review of existing duties, finding recent changes to Argentina’s export tax regime have eliminated government subsidies to the country’s biodiesel producers. If DOC’s preliminary decision is finalized, countervailing duty rates on Argentine biodiesel entering the United States would fall from an average of 72 percent to about 10 percent. DOC proposed no change to antidumping duty rates that currently average 75 percent.

The National Biodiesel Board’s (NBB’s) Fair Trade Coalition criticized the preliminary decision. In a statement, NBB’s vice president of federal affairs Kurt Kovarik said, “This appears to be an unprecedented and unjustified accommodation to Argentinian producers that threatens to harm US biodiesel producers and soybean farmers. Throughout this review, NBB has made the case that Argentina continues to massively subsidize its domestic biodiesel producers. Commerce’s proposal to eliminate trade protections for US biodiesel producers and soybean farmers is difficult to understand at a time when the [President Donald] Trump administration is asking them to bear huge economic costs from trade disruptions.”

DOC imposed final countervailing duty rates in 2018 ranging from 71.45 percent to 72.28 percent and antidumping duty rates varying from 60.44 percent to 86.41 percent. The higher rates were set to level the playing field for US producers to compete with producers that receive government subsidies in Argentina and Indonesia. Biodiesel imports from Argentina and Indonesia grew by 464 percent from 2014 to 2016, according to NBB, erasing 18.3 percentage points of market share from US producers. In 2016, imports of biodiesel from Argentina and Indonesia were valued at an estimated \$1.2 billion and \$268 million, respectively, according to DOC. In Argentina’s request for a review in late 2018, government officials said they had “decreased significantly the export tax on soybeans and other commodities in the soybean value chain, and imposed a new biodiesel export tax,” that warranted a review by US officials.

At about the same time, the US Environmental Protection Agency (EPA) proposed a minimal increase in US biofuel usage under the Renewable Fuel Standard (RFS), reflecting modest growth in production of next-generation cellulosic biofuels. Biodiesel producers immediately criticized the decision.

EPA’s proposed RFS renewable volume obligations (RVOs) would require usage of 20.04 billion gallons of biofuels, including ethanol and biodiesel, in 2020, up from 19.92 billion gallons this year. The increase is due to an expected growth in production of 122 million gallons in cellulosic biofuels. The RVOs for 2020 include 5.04 billion gallons of advanced biofuels, which includes cellulosic ethanol as well as biomass-based diesel, and 15 billion gallons of conventional corn ethanol.

EPA is also proposing to maintain the biodiesel RVO at 2.43 billion gallons in 2021, the same as finalized for 2020. EPA sets the biomass-based diesel RVO a year ahead of the mandates for other biofuels. Biomass-based diesel includes biodiesel (typically made from rendered fats, oils, and greases or virgin vegetable oils such as soybean and canola oil) and renewable diesel (which is chemically similar to petroleum diesel and produced from the same fats and oils).

In its proposed rule, EPA defended its decision not to increase the advanced biofuel requirements for anything other than cellulosic ethanol, citing existing tariffs on imports of biodiesel from Argentina and Indonesia and the fact that the \$1-a-gallon tax credit for biodiesel has lapsed. The agency also stated that holding the biomass-based diesel mandates steady though 2021 would ensure a market for other advanced biofuels, which include imported sugarcane ethanol that qualifies as an advanced biofuel because it is produced with lower greenhouse gas emissions than conventional ethanol. Kovarik commented that the proposal sends a “chilling signal” to biodiesel and renewable diesel producers, and that the agency failed to consider the industry’s ability to increase production.

“EPA’s proposed rule would turn the RFS program on its head,” he noted. “It is likely to reduce America’s use of cleaner, lower-carbon biodiesel and renewable diesel for transportation over the next several years, encouraging more petroleum use.” Groups representing ethanol producers blasted EPA for failing to propose increased ethanol blending requirements to account for volumes that had been reduced in the past because of the small refinery exemptions.

“It is a complete misnomer to call these blending volumes ‘obligations’ when EPA’s small refinery bailouts have essentially transformed the RFS into a voluntary program for nearly one-third of the nation’s oil refineries,” said Geoff Cooper, president and chief executive officer (CEO) of the Renewable Fuels Association.

Emily Skor, CEO of Growth Energy, remarked, “It’s unconscionable that EPA continues to undermine the president’s commitment to a strong rural America. The 2020 RVOs are a drop in the bucket compared to the demand lost due to a flood of refinery exemptions. Unless EPA restores demand destroyed through secret handouts to oil giants like Exxon and Chevron, these targets offer nothing but another year of lost opportunity and rural hardship.”

EPA has yet to make a determination regarding 38 small refinery exemptions for the 2018 compliance year. Cooper went on to say that the RVO proposal undermines Trump’s pledge to farmers and renewable fuel producers that his administration would enforce the statutory RFS volumes. EPA also declined to require any additional biofuel usage to address a court challenge of the 2016 RVOs. The case had been remanded back to the agency by the US Court of Appeals District of Columbia Circuit for further consideration. “In light of the fact that we can no longer incent additional renewable fuel generation in 2016, and the significant burden on obligated parties of imposing an additional standard, we

are proposing to retain the original 2016 total renewable fuel standard,” the agency commented in its proposed RVO rule.

In early July, NBB launched a television ad campaign highlighting the economic damage to biodiesel and renewable diesel producers from EPA’s small refinery exemptions. The ads ran for a week in Washington, DC, and in Des Moines, Iowa, pronouncing that “the president’s EPA is hurting farmers and eliminating jobs by giving special favors to big oil companies.” Regarding these ads, Kovarik added, “Just last month, President Trump vowed that his administration would defend America’s farmers. Yet his EPA is preparing another flood of RFS exemptions that will harm farmers.”

The National Renderers Association, NBB, and biofuels industry contend that the small refinery exemptions destroy demand for hundreds of millions of gallons of biodiesel and renewable diesel, which means a loss of jobs and a loss of value for agriculture. University of Illinois Professor Scott Irwin estimates the demand destruction could reach 2.45 billion gallons over the next several years, causing a \$7.7 billion economic loss for the biodiesel and renewable diesel industry.

In an example of cause-and-effect, after three years in operation, Flint Hills Resources is shuttering its Duonix biodiesel plant in Beatrice, Nebraska. The facility, originally built for \$50 million in 2008 and later purchased by Flint Hills at auction in 2011 for \$5 million, was retrofitted at a cost of \$100 million and specialized in processing corn oil and used cooking oil into biodiesel. The company cited low soybean prices and government intervention in the marketplace, including the expired federal blender’s tax credit, which continues to create business uncertainty, as reasons for the shutdown. On July 24, Renewable Energy Group announced it will close its New Boston, Texas, biorefinery due to challenging business conditions and prolonged federal policy uncertainty, most notably surrounding the long-lapsed federal biodiesel tax credit. The company acquired the 15-million-gallon-per-year biodiesel plant near Texarkana, Texas, in October 2012 and began producing biodiesel several months later. The facility is capable of running both high and low free fatty acid feedstocks and has truck and rail access.

Meanwhile, Seara Alimentos, the processed foods unit of Brazil’s JBS SA, will invest \$47.5 million to build a new biodiesel plant entering service by 2021. JBS said the new facility in Brazil’s Santa Catarina state will double the company’s current biodiesel production capacity to roughly 160 million gallons per year using pork and poultry fat as feedstock to produce the fuel.

The challenging US biofuels market is not limited to biodiesel producers. Ethanol production margins have moved into negative territory as well, signaling worsening conditions for the liquid biofuels market.

Major Grease Theft Ring Busted

A federal grand jury in Raleigh, North Carolina, has returned a superseding indictment charging 21 individuals with conspiracy to commit interstate transportation of stolen goods (used cooking oil) and money laundering. Additionally, 10 of the indicted were charged with immigration crimes. Fourteen of the 21 individuals are from outside the United States, including 12 from Mexico, with five from North Carolina, one

from New York, and one from Virginia. Six defendants were fugitives as of press time.

According to the indictment, used cooking oil—historically viewed as a waste product outside of the rendering industry—has become a much more valuable commodity over the past decade, resulting in increased thefts. The rendering industry estimates an annual loss of approximately \$45–75 million dollars from the theft of used cooking oil.

Court records state the objective of the conspiracy was to profit from the illicit trade in large quantities of used cooking oil stolen in North Carolina, Virginia, and Tennessee, and then transported to New Jersey for sale and distribution. In particular, the indictment alleges that members of the conspiracy repeatedly traveled to restaurants in North Carolina, Virginia, and Tennessee in box trucks equipped with containers designed to store and transport liquids, pumps, hoses, and burglary tools for the purpose of stealing large quantities of used cooking oil. Additionally, members of the conspiracy transported the stolen used cooking oil in the box trucks to a warehouse in Durham, North Carolina, for consolidation and storage. Thereafter, a tanker trailer was used to transport the stolen used cooking oil to Virginia and elsewhere.

“Used cooking oil has become a sought-after commodity by biodiesel companies, and restaurants use the sale of this oil as another source of revenue,” said John Eisert, acting special agent in charge of Homeland Security investigations in Charlotte, North Carolina. “This team of co-conspirators had an elaborate scheme to steal thousands of gallons of cooking oil for their own profit in violation of several US laws.”

If convicted on all charges, the defendants each face a maximum of 25 years in prison, a \$500,000 fine, and a term of supervised release.

California Plant Suffers Fire

A fire occurred at the Biodico Westside biodiesel production facility in Five Points, California, on the night of July 5, 2019. According to company founder and president Russ Teall, no one was injured, but the plant, with a 10 million gallon per year capacity using used cooking oil feedstock, appears to be a total loss. The cause of the fire is under investigation and has not yet been determined.

Producer Sentenced for Violating Regulations

American Biodiesel Inc. was sentenced in July for violations of the Clean Water Act. Registered in California’s San Joaquin County as Community Fuels, American Biodiesel manufactures biodiesel on property leased from the Port of Stockton.

According to court documents, the company admitted to allowing the discharge of industrial wastewater into the City of Stockton sewer system in violation of local permitting rules and the federal Clean Water Act. Community Fuels also conceded to tampering with monitoring devices and methods designed to detect such violations. Specifically, employees interfered with pH recordings and flow meters for the purpose of

Continued on page 27

Pet Food Alliance Making Progress

Over 100 attendees representing various sectors of the pet food and rendering industries joined together in June for a successful meeting of the Pet Food Alliance (PFA) in Loveland, Colorado. The meeting highlighted scientific presentations and discussion, and incorporated networking opportunities and working group conversations. It included informative reports and dialog on controlling foreign material in ingredients, measuring and controlling oxidation, using metagenomics and other technologies to control pathogens such as *Salmonella*, a new internet resource to combat negative and erroneous reports about rendering and pet food, and regulatory and export market updates.

In a PFA first, a supplier's reception was held one evening where sponsoring companies had an opportunity to provide information on their products and services in an informal social setting while newcomers and PFA veterans continued to develop new and existing relationships.

The meeting began with an educational foreign-material roundtable moderated by consultant Dr. Billie Johnson. Members of the panel included Dr. Jarrod Kersey of Simmons Pet Foods, Dr. Ansen Pond of Pilgrim's Pride, Dave Edmiston of Nestle-Purina PetCare, and Tom Roling of Smithfield Foods. The panel shared challenges in detecting and controlling foreign material in ingredients and pet food, current methods that work, hazard analyses, as well as possible improvements through enhanced communication, education, and technology.

PFA meeting attendees received an update on the significant progress of the Oxidation and Product Quality Working Group from Dr. B.J. Bench of Tyson Foods. He presented data from a laboratory session earlier this year where more than 30 oxidation experts gathered to run tests in a defined environment to compare results from a number of different methods on various rendered products. The work showed that excessive variation can easily confuse the interpretation of results and that careful procedures can reduce variability. After analysis is completed, Bench will publish results that could lead to new recommendations on measuring oxidation and other factors that could improve the shelf-life of pet food. Dr. Lili Towa of AlphaMos also described the availability of new methods to determine the oxidative status of products. The Oxidation and Product Quality Working Group listed these items of progress on 2019 priorities and action plans for the future:

- Leaders received more than 50 responses to a fat oxidation sampling method survey to provide information on which to base recommendations for improvement.
- The group will redesign and rerelease a sampling methods survey for dry products.
- The group intends to develop a cloud-based database for sharing oxidation study results.
- Efforts by this group will continue and additional members are needed to help identify work needed in priority areas.

As part of progress reported by the Consumer Perception and Sustainability Working Group, Sarah Hubler of Collings Nutrition Solutions provided an update on "MoKnows," a soon-to-be-released effort to combat the lack of credible pet food data and misinformation about nutrition that causes pet owners to make poor decisions on pet food and its ingredients. The aim of this new website will be to become the thought-leader and primary influencer for pet nutrition. The quality and nutritional value of ingredients is an emotionally charged subject for many pet owners who are very protective of their pets. Marketing messages and bloggers often convince pet parents of information that is not true. There are commonly held beliefs that the rendering and pet food industries are only motivated by money rather than what is best for pets. Rendered ingredients are often misunderstood and not trusted to be of high quality. This new information source for consumers and veterinarians will be designed and managed by independent pet nutritionists not obligated to any specific company or industry that understand the science of pet nutrition and ingredients that contribute to a healthy pet. PFA is encouraging and supporting this project as much as possible, while also respecting its independence in order to maintain its credibility. The Consumer Perception and Sustainability Working Group listed these items of progress on 2019 priorities and action plans for the future:

- Continue endorsement of the MoKnows platform.
- Plan an introductory short course for spring 2020 targeting undergraduate students to include tours of rendering and pet food facilities, as well as professional network building and career exploration.
- Work with the industries to create an informational video of rendering and pet food production.
- Develop a research literature database for rendering and pet food that will eventually include data from new sustainability and economic studies funded by the National Renderers Association, Pet Food Institute, and American Feed Industry Association.

PFA emphasis on food safety continued with a regulatory update by Jenny Murphy of the Food and Drug Administration that included progress on Food Safety Modernization Act implementation, the agency's priorities, and her observations on research gaps needed for future hazard analyses. Dr. Stan Bailey of bioMeireux presented developments of new pathogen detection strategies while Joe Heinzlmann of Neogen highlighted opportunities for using metagenomics profiling to improve food safety strategies in the pet food and rendering industries. The *Salmonella* and Product Safety Working Group listed these items of progress on 2019 priorities and action plans for the future:

- Distribute conclusions from a fat transportation survey.
- Formulate best practice for washing/cleaning fat tankers and distribute this new material to the industries.

- Develop videos for training on food safety testing/ foreign material mitigation.
- Solicit research proposals for rapid methods to detect pentobarbital.

Attendance at PFA meetings has grown by more than 450 percent since its first gathering. Over \$30,000 was raised from registration fees for the June meeting to fund additional research identified as high priority by PFA.

Background

The Fats and Proteins Research Foundation (FPRF) invested in a five-year agreement in 2017 with Colorado State University (CSU) to coordinate the PFA. Participants include renderers, pet food manufacturers, allied suppliers, and researchers from across the country. The size of the group grows with each meeting, with five productive meetings held since its inception in 2017. These meetings have been a great place to be seen and heard by suppliers and customers as both industries prepare for the future.

The alliance is part of an overall rendering industry effort to strengthen relationships with the pet food industry and ensure rendering's place in this strong market long into the future by working together to solve joint problems in policy, procedures, and research. The mission for the CSU/FPRF alliance is to bring together members of the pet food, meat, and rendering industries along with researchers and suppliers to collaboratively develop implementable solutions for industry challenges and identify opportunities for innovation, growth, and mutual achievement. The ultimate success of the PFA will depend on these central pillars:

- Uniting members of the pet food, meat, and rendering industries and their suppliers.
- Engaging and encouraging widespread participation from industry members.

- Facilitating research guided by industry input to address real-world industry challenges.
- Establishing multidisciplinary collaborations with academia and businesses across the country.
- Proactively engaging in building industry sustainability across all efforts.

Since the inception of the alliance, discussions of joint needs have been facilitated by three working groups: *Salmonella* and product safety, oxidation and product quality, and sustainability and consumer perception. The working groups are designed to elicit opinions and knowledge from all attendees. PFA welcomes new participants and will evolve and change both priorities and operating logistics as needs dictate.

During the first two years, the working groups have developed many action items, including:

- Assess gaps in industry knowledge on the best practices for transporting fat between rendering and pet food plants.
- Develop tools to train/educate plant employees on prevention of foreign materials entering the food stream.
- Research to better understand oxidation challenges (i.e., matrix issues, analytical variations, and interpretation of results).
- Validation of methods to consistently extract fat from meals for oxidation analysis.
- Continued communication and information sharing between the rendering and pet food industries.
- Develop youth and internship programs to expose young people to opportunities in the rendering, pet food, and allied industries.
- Develop strategies to improve consumer perception, understanding, and acceptance of rendered products and pet food.

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Biofuels *Continued from page 25*

underreporting acid and pollutant levels and volumes that would have exceeded the figures allowed under the city's regulations.

A US district judge imposed a three-year term of probation on American Biodiesel that includes various reporting and monitoring conditions, fined the company \$401,000, and ordered restitution to the Port of Stockton and the City of Stockton in the amount of \$256,206. The judge further ordered the company to develop and implement an effective compliance and ethics program, which will be submitted to the court for review.

The indictment in the case also charged Christopher Young, 41, of El Dorado Hills, California, with conspiracy, 12 counts of tampering with monitoring equipment, two counts of unlawful discharge of industrial wastewater, one count of false statements, and one count of witness tampering. Young was the director of operations at the Stockton plant. The same indictment charged his brother, Jeremiah Young, 38, of El Dorado, California, with conspiracy, eight counts of tampering with monitoring equipment, and two counts of unlawful discharge of industrial wastewater. Jeremiah Young was assistant operator for Community Fuels from 2014 to 2016. The Youngs' cases remain pending before the court. **R**

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Literacy and Language Challenges in the Workplace

Editor's note—Mark A. Lies II is an attorney and partner in the Workplace Safety and Environmental Group in the Chicago, Illinois, office of Seyfarth Shaw LLP. He focuses his practice in the areas of product liability, occupational safety and health, workplace violence, construction litigation, and related employment litigation.

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The American “melting pot” has become increasingly diversified as employers look to promote diversity and inclusion in the workplace. Throughout the last decade, the job market has tightened and employers face inevitable issues related to language and comprehension in the workplace. Employers can no longer assume that qualified workers speak or write English. Employers who hire non-English speaking workers are obligated to ensure that all employees, regardless of their linguistic background, receive and comprehend safety-related training. For employers whose supervisors speak only English, Occupational Safety and Health Administration (OSHA) requirements can present unique challenges. This article outlines OSHA’s policies with respect to training non-English speaking employees and offers recommendations for employers in assuring that all employees are adequately trained to work safely.

OSHA’s Training Requirements

Numerous OSHA standards, from lockout/tagout to forklift operation, or from bloodborne pathogens to hazard communication, all require employers to train or instruct employees in some way. In 29 *Code of Federal Regulations* (CFR) Section 1910.9(b), these training requirements “impose a separate compliance duty with respect to each employee covered by the requirement.” OSHA generally defines its training requirements as “performance-based,” meaning that OSHA defers to each individual employer to fashion the most effective manner by which to accomplish the compliance goal of the standard. For that reason, none of OSHA’s training standards require employers to use particular documents, teaching methods, or language to train employees. Instead, OSHA requires employers to present information in a manner that employees are capable of understanding. It should be noted that OSHA will consider any form of training to be suspect if employees do not have the opportunity to ask questions regarding the subject matter.

In its OSHA Training Standards Policy Statement released during Dr. David Michaels’ OSHA regime under President Barack Obama’s administration, the agency explained that “training required by OSHA standards must be presented in a manner that employees can understand. [. . .] In practical terms, this means that an employer must instruct its employees

using both a language and vocabulary that the employees can understand.” For example, if an employee is not literate, the employer does not satisfy OSHA training requirements merely by telling the employee to read training materials or safety programs. Likewise, if an employee does not speak, read, or understand English, training must be provided in a language the employee understands. If the employee’s vocabulary is limited, the training must account for that limitation.

Additionally, OSHA’s policy statement noted several specific requirements related to employee comprehension.

- CFR Section 1910.147(c)(7)(i) (Lockout/Tagout) requires the employer to verify that the employees have “acquired” the knowledge and skills which they have been trained.
- CFR Section 1910.134(k)(5)(ii) (Respiratory Protection) requires retraining when “inadequacies in the employee’s knowledge or use of the respirator indicate that the employee has not retained the requisite understanding or skill.”
- CFR Section 1910.1030(g)(2)(vii)(N) (Bloodborne Pathogens) requires “an opportunity for interactive questions and answers with the person conducting the training session.”

OSHA has tasked each of its compliance officers with the duty to determine whether the training provided by an employer satisfies the intent of the standard, for example, whether employees receiving the training have actually understood that training. Obviously, this is a highly subjective exercise. One way that an OSHA inspector will make this evaluation is to interview employees. These interviews may or may not take place in the presence of a management representative. Many OSHA inspectors are bilingual, particularly in Spanish, and those who are not may request another employee to act as an interpreter to translate during an employee interview. Translation issues can present potential bias problems during employee interviews, whether the interpreter is another employee, a management representative, or an OSHA official. For this reason, employers must ensure that employees understand their right to have a management representative, as well as an interpreter of their choosing (who can be a co-employee), present during the interview. Employers may also consider requesting that a neutral third-party act as interpreter during the employee interview, particularly if the interview is a critical one and accuracy is an important consideration.

Many employers fail to realize that unless they take the time to prepare an employee prior to the OSHA interview and explain to the employee his/her rights, an employee cannot possibly know these rights. There is no OSHA regulation that prohibits an employer from preparing an employee for the interview, including explaining the employee’s rights.

Another way OSHA inspectors will evaluate the employer’s compliance with safety training standards is by determining how the employer communicates other workplace rules and policies to employees, particularly job instructions, such as

other non-safety policies or procedures. If these other job instructions are given in Spanish, for example, OSHA will likely view English-only safety training as insufficient.

Ultimately, the OSHA inspector will determine, based on a review of all of the gathered facts, whether a “reasonable person would conclude” that the employer has or has not conveyed training to employees in a manner they are capable of understanding. In one case involving deficient safety training, for example, a supervisor described the company’s training program as follows: “Basically, in the yard with the men making sure they got their vests, their shoring, and their boards before they leave for the job. They are directed to not get in holes over four feet deep, when it’s unsafe to use the proper shoring.” (*Sec. of Labor v. J. Mess Plumbing Co. Inc.*, October 18, 2004.)

In that case, most of the company’s employees had immigrated from Bosnia and Albania and could not speak English. Where an employee could not speak English, another co-worker would translate the materials for him. In addition, the employer did not maintain any documentary evidence of a training program. An administrative law judge upheld OSHA’s citation under a construction industry training standard, finding that the employer “hired workers who are not fluent in English, and then failed to ensure that they understood the minimal training they received.” (OSHA offers employers a Resource for Development and Delivery of Training to Workers guidance document online.)

Liability for Per-employee Citations

Case law precedent from the Occupational Safety and Health Review Commission validated OSHA’s ability to issue citations under its training standards on a per-employee basis, meaning that OSHA can issue a separate citation and penalty for every employee who did not understand his or her required safety training. In *Sec. of Labor v. E. Smalis Painting Co.* (April 10, 2009), OSHA issued a total of 71 willful citations to Smalis for failure to train 71 employees as required in OSHA’s lead in construction standard. The review commission upheld 27 of those citations, one for each of the 27 employees who had been exposed to lead at or above the

action level and who had not received the training, and imposed a penalty of over \$5 million.

The review commission’s decision in *Smalis* was based on its finding that training requirements under OSHA’s asbestos standard “impose a duty that runs to each employee.” While the *Smalis* decision is based on the employer’s failure to train altogether, the review commission’s reasoning may well be applied to situations involving the adequacy of an employer’s training program as it relates to non-English speaking employees.

Recently, OSHA issued a citation in the amount of nearly \$1.8 million to a roofing contractor for failure to ensure employee training and the use of fall protection to its employees. The citation included 13 willful citations with the maximum penalty of \$132,598 for each of the 13 employees who were exposed to a fall hazard at multiple job sites. Unfortunately, the citations arose from a fall-related fatality. The employer was also indicted for manslaughter and workplace manslaughter.

OSHA’s Expansion of Enforcement on Written Employer Policies

Recently, OSHA has taken the new, aggressive enforcement position that an employer’s safety procedures (e.g., machine-specific logout/tagout

procedures)—not merely verbal and written training materials—must also be translated into the foreign languages spoken by employees. No OSHA standard specifically requires employers to translate procedures into every language spoken by employees. The task of translating all procedures for a potentially transient workforce may be costly and infeasible for many employers, particularly smaller ones with limited resources and with a workforce containing many ethnic groups. Accordingly, it is not believed that OSHA’s enforcement position is supported by the law or is economically feasible, or that employers should assume the duty of translating all procedures into the languages spoken by employees.

English Only Employment Policies for Safety-sensitive Areas

Employers may be tempted to avoid OSHA’s onerous and subjective training policies by employing only English-speaking workers. Employers must proceed with extreme caution in fashioning these types of policies so as not to run afoul of federal and state anti-discrimination laws. Employers who fashion “English-only” policies prohibiting employees from speaking

Continued on page 31



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Addressing Chemical Security in Rendering

The United States (US) rendering industry relies upon a variety of chemicals for the production of the various fats, proteins, and mineral products manufactured every day. When used properly, these chemicals are beneficial; however, in the wrong hands, some of these same chemicals can also be used by terrorists to do great harm.

To reduce the risk of hazardous chemicals being weaponized, US Congress authorized the Department of Homeland Security (DHS) to establish the Chemical Facility Anti-Terrorism Standards (CFATS) program. “We continue to see our adversaries around the world seeking out and using chemicals in attacks—including those that are covered under CFATS,” said David Wulf, who leads the regulatory program. “We need look no further than to the continuing threat streams, intelligence community assessments, and incidents in Belgium, Syria, France, and the United Kingdom to know that this is not a time to stop addressing the security threat posed by chemical terrorism.”

Managed by DHS’ Cybersecurity and Infrastructure Security Agency (CISA), CFATS identifies and regulates high-risk chemical facilities to ensure security measures are in place to reduce the risks associated with certain hazardous chemicals, known as chemicals of interest (COI). Rendering plants that use COI are considered chemical facilities under CFATS and may be subject to its regulations. “The CFATS program is a vital part of our nation’s counterterrorism efforts and we work closely with industry stakeholders to keep dangerous chemicals out of the hands of those who wish to weaponize them,” Wulf commented.

Anhydrous ammonia, the most commonly reported COI in the rendering industry, is used in closed-loop refrigeration systems to chill carcasses or products to prevent spoilage. Chlorine, the second most common COI, is utilized to treat process water or wastewater, or as an oxidizer to remove odors from emissions. Propane, the third most common COI, is often used as a primary backup fuel for generators, heaters, or other machines. Other COI sometimes found in rendering facilities include hydrogen peroxide, ammonia solutions, sodium nitrate, and chlorine dioxide.

To determine if the CFATS regulation is applicable, rendering facilities should review Appendix A of the regulation at www.dhs.gov/cisa/appendix-chemicals-interest for a complete list of COI and their respective screening threshold quantities. If not covered in a statutory exclusion, facilities with COI at or above their screening threshold quantity must report their holdings to CISA within 60 days of possession by filing an online survey called a Top-Screen, which is available through the Chemical Security Assessment Tool, an online portal that houses CFATS-related applications, at www.dhs.gov/cisa/chemical-security-assessment-tool. CISA uses this information to determine if the facility presents a high level of security risk, and is thus required to implement security measures through an approved security plan.

“CFATS is a smart, regulatory program, and its non-prescriptive, flexible design allows each regulated facility to customize security measures to meet the required risk-based performance standards,” stated Wulf. He added that as a result of implementation of the program, the level of security across the chemical industry has significantly increased, not only making an attack on a chemical facility more difficult, but also serving as a significant deterrent to adversaries who might seek to attack facilities or acquire chemicals for use in an offsite terrorist attack.

All rendering facilities, whether or not covered under CFATS, should consider availing themselves of the voluntary security resources provided via the DHS Hometown Security initiative: Connect, Plan, Train, and Report. It is everyone’s responsibility to ensure that hazardous chemicals do not fall into the wrong hands, and we all need to do our part in ensuring the security of US communities.

Questions concerning the CFATS program or any of its components can be addressed to the CFATS Help Desk at csat@hq.dhs.gov or (866) 323-2957. More information on the program can be found at www.dhs.gov/cfats. **R**



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languages other than English at all times in the workplace are presumed to be discriminating on the basis of an employee's national origin. Federal regulations implementing Title VII of the Civil Rights Act call such policies "a burdensome term and condition of an employment," and provide that prohibiting non-English languages in the workplace at all times "disadvantages an individual's employment opportunities on the basis of national origin" and creates "an atmosphere of inferiority, isolation, and intimidation based on national origin." (29 CFR Section 1606.7(a))

These same regulations do recognize, however (when applied only at certain times), that an English-only policy in the workplace may be appropriate and non-discriminatory. To avoid liability for discrimination, the employer must establish that the rule is justified by a "business necessity." In its *Compliance Manual*, the Equal Employment Opportunity Commission (EEOC) has recognized the need for the safe operation of an employer's business is considered a "business necessity" that can justify an English-only rule that is tailored to specific circumstances. The EEOC also recognizes that the need for supervisors who only speak English to communicate with employees is also a "business necessity" that can justify an appropriately narrow English-only policy.

The EEOC cites the following scenario as an appropriate use of an English-only rule to address safety concerns:

XYZ Petroleum Corp. operates an oil refinery and has a rule requiring all employees to speak only English during an emergency. The rule also requires that employees speak in English while performing job duties in laboratories and processing areas where there is the danger of fire or explosion. The rule does not apply to casual conversations between employees in the laboratory or processing areas when they are not performing a job duty. The English-only rule does not violate Title VII because it is narrowly tailored to safety requirements. (EEOC *Compliance Manual*, Section 13: National Origin Discrimination)

According to this example, then, an employer would not run afoul of federal non-discrimination laws by requiring employees to speak only English while performing specific job functions, during emergency situations, or while working in particular areas of a facility that implicate workplace safety issues.

Employers must also take care in making hiring decisions based on a candidate's ability to speak English. A narrowly-tailored and appropriately used English-only policy is relevant to hiring decisions. If, for example, an employer has an English-only policy like XYZ Corporation's in the above example, it would need to consider that policy in hiring employees to work in laboratories and processing areas, or, for example, certain equipment that has control systems that are identified in English or requires the use of operation manuals that are available only in English. Candidates who speak no English would not be able to adhere to the policy and would therefore not be qualified for hire into a position that includes work in

those areas. Similarly, even in the absence of an English-only policy, an employer does not violate federal anti-discrimination laws by rejecting a non-English speaking candidate whose inability to speak or understand English would materially affect his or her ability to perform job duties. If, for example, a candidate's job duties would require forklift operation, and the candidate could not read or understand warning signs, operating manuals, or safety placards required for the safe operation of a forklift, then the employer would have a good faith, non-discriminatory reason for rejecting that candidate.

Conclusion and Recommendations

It is recommended that all employers who employ workers with limited or no ability to speak or understand English carefully evaluate their safety training programs to ensure those employees have received and understood required safety training, including the following:

- Review the means by which work instructions are communicated to employees. If work-related instructions and other non-safety related policies are communicated in languages other than English, strongly consider providing safety training in those languages as well.
- Where appropriate, incorporate photographs and illustrations into procedures and training. These will be more readily understood by speakers of any language proficiency.
- Incorporate practical "tests" into required safety training involving visual observation of the employee actually performing safety-related tasks, thereby allowing employees to demonstrate their understanding (or lack thereof) of core safety concepts.
- Maintain thorough documentation of employee training, including any practical tests as part of any training. Obtain a signed statement from each employee that he/she has received and understood specific safety training provided and, if necessary, have a bilingual employee trainer countersign and date the statement.
- In the event of an OSHA inspection, advise all employees of their right to have a management representative or another employee present during any interviews or to decline the interview if OSHA refuses the employee's request. Designate a qualified and competent person (whether management or non-management) to act as the "go to" interpreter to facilitate interviews with non-English speaking employees.
- Evaluate employee duties on a job-by-job basis to determine whether critical job- or safety-related functions require fluency in English. For certain tasks where English fluency is a critical job qualification for safety purposes, include such requirements in the job description and hiring process. **R**

For further information, please contact Mark A. Lies II at mlies@seyfarth.com, or Adam R. Young at ayoung@seyfarth.com.

Canadian Renderer Bestowed Honor

Her Excellency the Right Honorable Julie Payette, governor general of Canada, made 83 new appointments to the Order of Canada in late June, including 5 companions, 21 officers, and 57 members. One of those bestowed as Officer of the Order was West Coast Reduction Chairman Gordon R. Diamond, “for his steadfast leadership in business and for his philanthropic support for causes related to health care, education, and social services.” Diamond was previously a recipient of the Order of British Columbia in 2007 for his support of numerous organizations in “his community, his province, his country, and countries beyond.”



Gordon Diamond

Created in 1967—Canada’s centennial year—the Order of Canada honors individuals who make extraordinary contributions to the nation, with more than 7,000 people from all sectors of society having been invested. “The contributions of these trailblazers are varied, yet they have all enriched the lives of others and made a difference to this country,” explains the Canadian’s governor general’s website. “Their grit and passion inspire us, teach us, and show us the way forward. They exemplify the Order’s motto: Desiderantes Meliorem Patriam (“They desire a better country”).

Darling Opens Third Fertilizer Plant

Darling Ingredients Inc. has opened its third organic fertilizer production facility, this one in Fremont, Nebraska, on a 10-acre site, with the ability to annually produce 35,000 tons of the company’s Nature Safe Natural and Organic Fertilizer. The new plant and finished product storage is designed to meet the needs of organic growers in the central region of the United States (US). Darling has operated Nature Safe out of its original Henderson, Kentucky, facility since the early 1990s, where it will continue to produce premium fertilizer for customers in the Midwest, Northeast, and Southeast regions of the country. The company opened an organic fertilizer plant in Turlock, California, at the beginning of this year to serve the West. The Nebraska facility will utilize product from several nearby Darling rendering plants.

Universal Maintenance Founder Passes



Ed Hill

Ed Hill of Universal Maintenance passed away July 28 due to complications from a stroke he suffered the week before. He was 64 years old.

Hill loved the rendering industry and worked on new plant construction and maintenance for a variety of rendering companies. He began his career in paper mill construction before working for American Proteins, Darling Ingredients, Fieldale Farms, and Pilgrims. Hill invented and patented a dewatering system, called UMDK, and held other patents as well.

In 2005, Hill and his daughter, Jessica Colbert, started Universal Maintenance as a family business. Hill took great pride in quality construction for rendering plants and enjoyed the industry because “the people were great,” his daughter shared. Universal Maintenance is an associate member of the National Renderers Association and has been an exhibitor and strong sponsor of the association’s annual convention for years. Colbert will continue operating Universal Maintenance.

Hill is survived by his wife, Susan; three daughters, Jessica (Jesse) Colbert, Patricia Patterson, and Lyndsey (Lee) Cathey; and his mother, three brothers, and six grandchildren. Memorial contributions may be made to Samaritan’s Purse and St. Jude’s Research Hospital.

Groups Awarded Trade Funding

The United States Department of Agriculture (USDA) recently awarded \$100 million to 48 organizations through the Agricultural Trade Promotion (ATP) program to help US farmers, ranchers, and other agriculture producers identify and access new export markets. The National Renderers Association (NRA) was one of the organizations awarded monies, receiving \$700,000 to be used to discover new markets to offset losses due to the US-China trade war. This new funding is in addition to the \$547,000 NRA received last fall under round one of the program and in addition to monies it receives from the Market Access Program and Foreign Market Development programs for overseas market development activities. The US Hides, Skins, and Leather Association was also awarded \$700,000 in ATP program funding after having already received \$1.375 million in ATP funds earlier this year.

In May, President Donald Trump authorized USDA to provide up to \$16 billion in new support programs, which is in line with the estimated impacts of retaliatory tariffs on US agricultural goods and other trade disruptions. ATP is one of three programs that will assist agricultural producers while Trump works to address long-standing market access barriers.

The 48 recipients are among the cooperator organizations that applied for \$200 million in ATP funds in 2018 and awarded earlier this year. According to USDA, the support provided since January has boosted exports for US agriculture, food, fish, and forestry products, including a trade mission to Pakistan that generated \$10 million in projected 2019 sales of pulse crops, a new marketing program for Alaska seafood that led to more than \$4 million in sales of salmon to Vietnam and Thailand, and a comprehensive marketing effort by the US soybean industry that has increased exposure in more than 50 international markets. **R**



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RENDERING IS RECYCLING

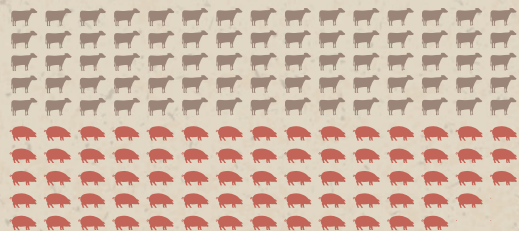


RENDERING IS AN ENVIRONMENTALLY FRIENDLY WAY TO RECYCLE MATERIAL THAT WOULD BE WASTED

WHAT MATERIALS ARE RENDERED?

Packing Plants

147.2 MILLION head of cattle, calves, hogs & sheep are slaughtered annually in the US



10 BILLION chickens and turkeys are processed each year in the US

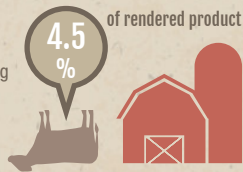


APPROXIMATELY 50%

of the animal is considered inedible by Americans and goes to renderers including: bones, fat, blood, feathers & some internal organs

Farms

Some animals die on the farm from injury, old age, or other issues. Renderers prevent this from becoming a public health hazard by eliminating pathogens in the rendering process. Fallen animals only represent about 4.5% of rendered product



Grocery Stores generate

Super Foods

1.92 BILLION POUNDS

of scraps, fat, bone, expired meat & used cooking oil annually

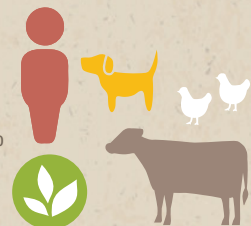
Renderers collect



4.4 BILLION POUNDS of used cooking oil per year in the U.S. and Canada

RENDERING IS SAFE & ESSENTIAL

- Protects the environment
- Protects human health
- Protects animal health
- Sustainable and contributes to sustainability of animal agriculture
- Essential link in food chain



WHAT ARE THE PRODUCTS OF RENDERING?

Renderers collect:

56 BILLION POUNDS

of raw materials every year in the U.S. and Canada



If all renderable product was sent to the landfill, all available space would be used in

4 YEARS

Renderers recycle these materials into:

10 BILLION POUNDS

of fat and oil products



& 9 BILLION POUNDS

of protein products annually



Rendered products are ingredients in:



Pet & livestock feed



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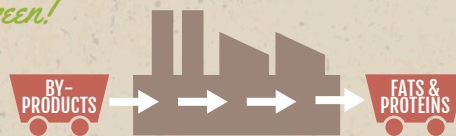
Fertilizer

Plus Other products like soaps, lubricants, detergents, and more.

RENDERING IS Green!

Rendering is:

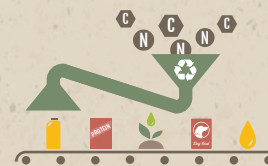
the process of breaking down animal by-products into fats & proteins



Rendering is recycling!

Carbon- and nitrogen-rich materials are recycled into

USEABLE PRODUCTS



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Carbon dioxide, methane, and other greenhouse gas emissions from natural decomposition like in a compost pile or landfill are avoided.



A single decomposing dairy cow releases **1.2 METRIC TONS** of carbon dioxide.

Rendering avoids this!

Rendering these animal tissues has the same effect on greenhouse gas emissions as removing



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Farewell to Two Industry Leaders



“Big Mike” Koewler



Marty Griffin

The rendering industry recently lost two pivotal industry members, both dear friends and colleagues, with the passing of A. Michael Koewler, past president and third generation of Sacramento Rendering Company in Sacramento, California, and Martin “Marty” W. Griffin of Griffin Industries, now Darling Ingredients Inc.

Koewler, or “Big Mike” as he was affectionately called, served as president of the Pacific Coast Renderers Association (PCRA) from 1981-1983, and president (now known as chairman) of the National Renderers Association (NRA) from 1995-1997. He was awarded the coveted Tallowmaster by PCRA in 2006 for his years of dedication and involvement in the rendering industry. Koewler died July 6 after a valiant fight with pancreatic cancer the last two years. He would have been 80 years old on August 2, 2019. He is survived by his wife, Patty; a son, Michael (Lisa); two daughters, Kelly and Katie; two grandchildren, Taylor and Jack; two brothers, Jerry (Catherine) and Tim (Gail); and numerous other family and friends. In lieu of flowers, donations may be made to Saint Ignatius Parish School in Sacramento, California, or Ducks Unlimited.

Griffin, 60, was well-known in the rendering industry and NRA. He worked in a variety of positions at his family’s company, Griffin Industries, for 25 years, where he oversaw construction of new facilities and managed rendering operations. He was also involved in construction of the first United States biodiesel plant that used animal fats as feedstock and helped develop special nutrition products from poultry by-products for use in pet food and aquaculture. Griffin was chief operations officer (COO) until Darling Ingredients acquired Griffin Industries in 2012. Upon his retirement in 2015, he was executive vice president and COO for Darling where he was responsible for all rendering, bakery, biodiesel, cooking oil, and trap grease operations in North America.

Griffin is survived by his wife, Maria Creel Griffin; two children, Jessica Marie (Brian) Boyers and Stephanie Griffin (Derek Nobles); five grandchildren, Brody, Avery, Skylar, Emery, and Waylon; three step-children, Seth, Matthew, and Aubrey Bryson; and numerous brothers and sisters, John M. (Juanita) Griffin, Linda M. (the late Dave) Holt, Judith E. (Gerald) Prewitt, Janet E. (Roger) Means, Robert A. (Carol) Griffin, Elizabeth A. (William) Osborn, Cynthia L. (Terry) Roeder, Thomas (Cheri Wolfe) Griffin, and the late Dennis B. (Joyce) Griffin, Ronald L. Griffin, and James K. (Teresa Wright) Griffin. Memorial contributions in Griffin’s name may be made to UC Health Barrett Cancer Center in Cincinnati, Ohio.

R



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