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August 2025



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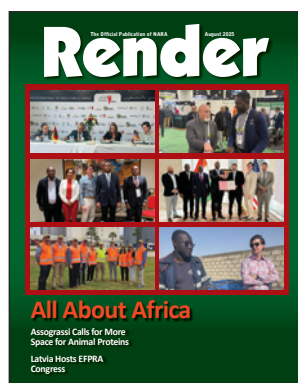
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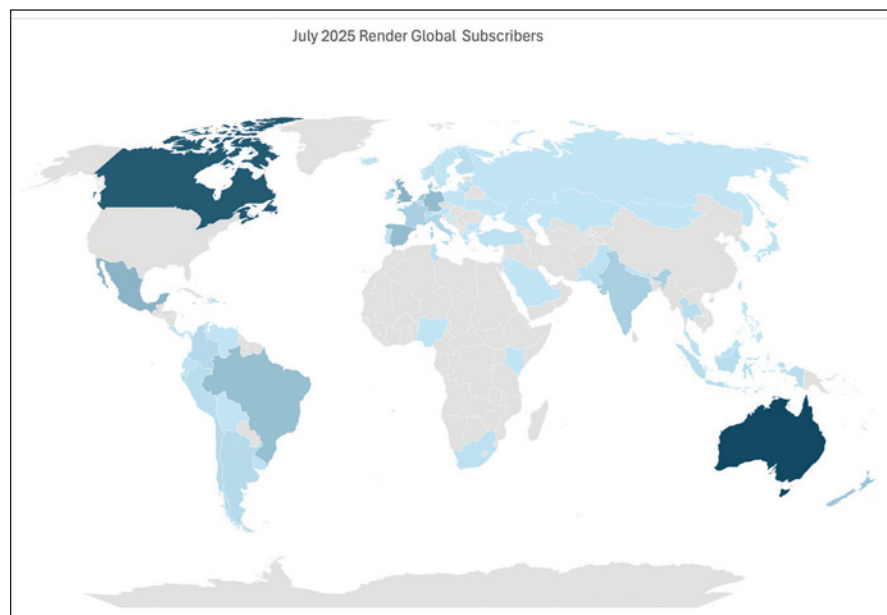
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Render's International Reach



With August being our international-focused issue, it seems appropriate to consider how many of our subscribers — both print and digital — live outside of the U.S. It turns out that around 24% of subscriptions go out to 68 countries all over the globe (see map). To estimate *Render's* total reach, however, the pass-along readership must be considered, which recognizes that publications have more readers for each issue than just the subscribers. Copies get passed around the office, waiting rooms, trade shows, etc.

While we don't survey this, the general average for trade publications is two to three and a half additional readers per copy. Altogether, our international readership would reach between 1,086 and 1,900. To the best of my knowledge, while other countries have magazines that cover their rendering industries, *Render* is still the only international rendering magazine. This can be credited to my predecessor, Tina Caparella, who worked hard to achieve an international presence.

In fact, the tagline on *Render's* cover used to be "The International Magazine of Rendering." Last year it changed to "The Official Publication of NARA," because so many of the younger people I speak with at meetings who are new to the industry are not aware that the magazine is owned by the North American Renderers Association.

That connection, which is so valuable to advertisers, seemed necessary to highlight because the active members of NARA are the VIP decisionmakers when it comes to buying rendering

equipment and services. Every member of NARA receives at least one copy of *Render*, though many request extras for employees.

Recently, a longtime client based in Europe let me know they could tell when they placed a new ad in *Render*, because their social media and website visits went up when the magazine came out by 1,000 or so just from the U.S. alone. Clearly, your ads in this magazine get noticed.

To our readers all over the world, thank you for including *Render* in your news sources. We encourage you to send us rendering news from your country for our consideration. It's a big world, but this is a close-knit industry in terms of the people in it, and we love to keep in touch.

Now for a little fun, a pop quiz. Can you guess the Top 10 countries outside of the U.S. where *Render* subscribers reside? Turn to page 36 above the advertiser index for the answers. **R**

Sharla Ishmael
Editor/Publisher

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‘One Big Beautiful Bill Act’ Is Now Law

With plenty of last-minute dealmaking and cliffhanging votes in both the U.S. House of Representatives and the Senate, the “One, Big Beautiful Bill Act” was signed into law July 4 by President Donald Trump, meeting a deadline set by the president few thought could be met.

In doing so, Trump solidified his place among the most effective vote-whipping presidents to occupy the Oval Office. Passing the Senate by a single, tie-breaking vote from Vice President J.D. Vance, the law makes permanent virtually all the 2017 tax cuts originally signed into law during the first Trump administration. In doing so, the price tag of \$3.3 trillion estimated by the Congressional Budget Office also includes a debt limit increase of \$5 trillion to allow the U.S. Department of Treasury to continue borrowing to pay the nation’s bills.

How Rendering Is Affected

In addition to ensuring lower tax rates for corporations and individuals, the law includes several sections that are important to the rendering industry. For example, the estate gift tax exemption is permanently extended and increased from \$10 million to \$15 million starting in tax year 2026, with the exemption indexed to inflation annually.

Certain businesses — specifically pass-through business income from partnerships, LLCs, S corporations or self-employed individuals — will now be taxed according to individual rates or the taxes will be passed through to their owners. Under the new law, the 20% deduction for this qualified income is exempted and the exemption is made permanent. Also, 100% bonus depreciation is restored for qualifying depreciable property

used on or after Jan. 19, 2025, and before 2031. The maximum amount that can be deducted for certain depreciable assets is increased from \$1 million to \$2.5 million and the maximum amount is phased out for property that exceeds \$4 million, up from \$2.5 million.

The new law doesn’t stop with tax policy. Much of the traditional Farm Bill was also extended through 2031 including the commodity program safety net covering row crops as well as the federal dairy support and sugar programs. For rendering, a long-sought increase in U.S. Department of Agriculture export promotion programs is now law. Twenty years of stagnate funding for the Market Access Program and the Foreign Market Development Program ended with a doubling of funds for both authorized by the Supplemental Agricultural Trade Promotion Program.

Although under a different name forced by Senate parliamentary rules governing the budget reconciliation process, the SATPP beginning in fiscal year 2027 provides \$285 million on top of the existing trade programs permanently authorized by the current Farm Bill. For the U.S. agricultural trade balance sheet, the help can’t come soon enough.

Released after an update in May, the USDA trade forecast now shows a surging trade deficit pegged at \$49.5 billion annually. Over the course of a decade, the U.S. ag trade balance has flipped from a \$37.5 billion surplus to a nearly \$50 billion deficit with little done to diagnose the problem or prescribe a solution. If the current trend line holds, the deficit could grow to \$100 billion in just a few years’ time.

For now, the SATPP is a much-needed recompense in the “big, beautiful bill.”



Rendering Workers Lobby California Legislature

Drivers and plant workers from Darling Ingredients, Baker Commodities and Sacramento Rendering gathered in the California state capitol to oppose AB411— a vaguely written bill that would permit animal composting statewide and concerns renderers. They were joined by Matt Broad, lobbyist for the Teamsters union, on the far left.

WOAH Launches Standards Navigation Tool

Reflecting on the importance of timely access to data, the development of the new World Organization for Animal Health standards navigation tool is an example of WOAH's drive to modernize access to its international standards and improve accessibility and visibility of this text for members and stakeholders. Available since April, the standards navigation tool has replaced the previous codes and manuals section online.

WOAH international standards — the terrestrial and aquatic codes and manuals — establish benchmarks for the improvement of terrestrial and aquatic animal health and welfare and veterinary

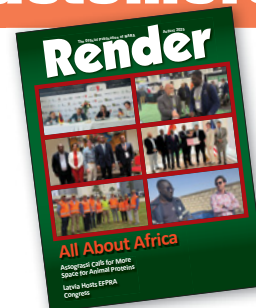
public health worldwide. In this digital age, competent authorities must have access to the WOAH standards using a fit-for-purpose digital tool. This new standards navigation tool provides an intuitive, accessible and flexible solution.

The platform enables users to search across multiple standards and filter content based on specific needs. A user-friendly interface also assists clients

in finding recommendations for safe international trade by commodity, making it easier for competent authorities and stakeholders to develop and negotiate appropriate sanitary measures in accordance with the animal health situation of trading partners.

Access the new standards navigation tool at woah.org/en/what-we-do/standards/codes-and-manuals. **R**

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From left, Dr. Youssef Mikou, director general of Alf Sahel (Morocco's largest feed mill), Anouar Tabiri, president of the Animal Feed Mill Association of Morocco, NARA's Dana Johnson Downing and Matthew Meredith of LixCap, launched an important collaboration in Morocco with the first signing of an MOU in December.

All About Africa

NARA's collaboration with stakeholders in Africa has the potential to open up fresh markets for rendered products, generating a win-win outcome as new imports of U.S. fat and protein could help grow pet food, livestock and aquaculture industries in the region.

By Sharla Ishmael

When U.S. renderers think of thriving export markets, countries like Morocco, Senegal, Tunisia and Côte d'Ivoire don't make the list — at least not today. That is likely to change if the North American Renderers Association's market development efforts in Africa over the past couple of years continue to gain momentum.

NARA has worked for years trying to get traction in Africa, but recent funding increases have allowed the association to get a local presence on the ground in Morocco to cultivate relationships with industry and government officials, offer technical assistance programs and collaborate on updating regulations that currently prevent most trading of rendered products to these countries.

"We're not new to Africa," says Kent Swisher, NARA president and CEO. "Initially, we had some funds from the U.S. Department of Agriculture's Emerging Markets Program that were designated specifically for North and West Africa. But what we've needed for a long time is a person in country and now we have that thanks to USDA's Regional Agriculture Promotion Program funding. That allowed us to hire a consultant with offices in Morocco — Matthew Meredith of

LixCap. He's doing a great job building on our past efforts, taking NARA's market development programs to a new level in Morocco, Cote d'Ivoire, Senegal and Tunisia with eyes on more countries in the near future.

"Today, Africa is what Southeast Asia was 20 to 30 years ago in terms of potential for rendered products," Swisher adds. "Southeast Asia is now the biggest market that we have. In Africa, we're in the early stages of market development. Some of these countries have smaller markets, but together they add up. Africa is where the growth is now, both from a population standpoint and also an expanding middle class."

Out of the \$6.3 million USDA awarded NARA through RAPP funding, \$1.6 million is specifically earmarked for Africa. In addition to in-country meetings and engagement, the funding will also support hosting delegations from these potential trading partners, according to Dana Johnson Downing, NARA's senior vice president of international programs. Market Access Program funding also helps NARA staff travel to the region for trade missions in Africa.

In December, Downing went to Morocco to meet with key stakeholders, a visit that culminated in the signing of a

memorandum of understanding (MOU) between NARA and the Moroccan Feed Manufacturers Association (AFAC). This MOU established a framework for sustained collaboration, technical training and policy advocacy to support the adoption of rendered products in poultry, aquaculture and livestock feed.

This collaboration then brought about high-level discussions between the U.S. Animal and Plant Health Inspection Service and Morocco's National Office for Food Safety (ONSSA), advancing negotiations on sanitary certificates to allow broader importation of U.S. rendered products.

"We have a system audit and study tour on the horizon with three people from ONSSA and two people from AFAC for meetings and site visits in the U.S. to learn more about our food safety system and feed regulatory framework," Downing explains. "It's meant to help ONSSA determine that our standards for managing risk and preventive controls for foodborne illness are equivalent to their system and to build confidence in the safety of rendered products from the U.S. That trip is tentatively planned for October.

"To facilitate the trade of U.S. rendered products, Morocco will need to establish import requirements and negotiate a model health certificate with APHIS, so this visit will be a significant step forward in resolving market access barriers," she adds. "Once the Moroccan market is open, we believe other francophone countries in Africa will likely open as well because they can use the same regulatory standards as a model."

Next Up

This approach — land then expand — nicely sums up NARA's strategy in Africa. Of course, that's a major simplification of the meticulous process that will play out over a number of years. While Meredith and his LixCap associates are working to advance NARA's mission in Morocco, Tunisia, Senegal and Côte d'Ivoire, market assessments for other areas such as Kenya, Ghana and southern Africa are planned. U.S. rendered ingredients could be vital for all of these countries to grow their pet food and aquaculture markets.

"This is a market that's going to take a long time," says Meredith, managing director of LixCap, a consultancy that supports economic development in

emerging markets. "But Africa is the only continuous geography on the planet that has a growing population, rising gross domestic product (GDP) and rapidly increasing urbanization — all of which favor animal feed, livestock, poultry and aquaculture production and consumption. There is, however, a lot of legwork to be covered in these markets."

One of the biggest trade barriers NARA has encountered in Africa dates back to the bovine spongiform encephalopathy (BSE) crisis from over 20 years ago. Comparable to European standards, regulations in many African countries include banning the inclusion of rendered products in feed formulations — based on outdated BSE risk parameters. The EU is slowly relaxing its feed ban regulations and many regulators in Africa are willing to discuss modernizing their regulations as more information is shared.

"One of our primary objectives in a lot of these markets is to foster an up-to-date understanding about how to manage and mitigate these risks," Meredith adds. "These factors are well understood and regulated in developed markets. The U.S. industry knows how to safely incorporate rendered products into feedstocks for a healthy and safe ration.

"Right now, we're trying to build a positive stakeholder environment," he says. "We're doing a lot of industry

business-led engagement, speaking directly to the industrial actors, whether it's the feed millers or the federations that deal with livestock, aquaculture or poultry. Those are the doors we're knocking on right now. As we get industry on board, then we go together to talk with the regulators."

Downing points out NARA has a strong message when they talk about U.S. rendered products and why they can have full confidence in using these ingredients when they talk with potential trading partners.

"When we talk with regulators and feed stakeholders, one message is crystal clear — the U.S. only exports animal by-products that we use ourselves in both our feed and food systems," Downing says. "Contrast that with the EU, which bans certain processed animal proteins (PAPs) domestically yet floods Southeast Asia with them. Selling something to a trading partner that you won't use at home? That should set off some trust alarms.

"Then there's Singapore — Europe's second-largest PAP customer," she adds. "Imports of 170,000 metric tons of PAP from Europe to a city-state with virtually no livestock? That raises eyebrows and serious questions about transparency and intent."

Continued on page 10



From left, NARA's Dr. Charles Starkey visited with Nana Kwasi Fosu Gyabaah, head of formulation for an integrated Ghanaian poultry feed mill and processor, at IPPE in Atlanta.



At the International Exhibition of Agriculture and Animal Resources (SARA) in Côte d'Ivoire, from left, Paul Kasse, NARA representative in Côte d'Ivoire, Leroux Roux, chief of staff of MIRAH, Matthew Meredith, Sidi Touré, Minister of Animal and Fisheries Resources, and Gouromenan Assoumani, cabinet director of MIRAH.

All About Africa *Continued from page 9*

So far, NARA and its consultants are building trust and consistently finding positive industry support in North and West Africa for utilizing U.S. rendered products in animal and aquafeed rations.

"Once we start talking with all of these groups about how to use rendered products to enhance a feed ration, you can see the wheels start to turn," Meredith explains. "It's something they've heard about, and it sounds pretty good, but they don't really know how to do it. So, the next step for NARA is to offer technical assistance programs — training and research on feed formulation and other industry know-how that we can bring to the table either through seminars or other consultations."

Furthermore, joint discussions with regulators are also moving closer toward necessary reform to open these markets for rendered products. In fact, a major milestone was announced July 16 with the signing of a landmark MOU between the Ministry of Animal and Fisheries Resources of Côte d'Ivoire (MIRAH) and NARA, which paves the way for deeper collaboration on high quality, sustainable and cost effective feed ingredients to strengthen Côte d'Ivoire's livestock and aquaculture industries.

Work Still Needed Back Home

With significant progress ongoing in Africa, NARA is also addressing crucial trade issues domestically with the federal agencies responsible for trade negotiations.

"Africa has not been a priority focus area at APHIS for rendered products," explains Meredith. "Historically, USDA spends most of its time for the feed industry dealing with soy, grain and corn as component feed industry inputs. We're determined to elevate rendered products so they are part of the trade negotiation agenda. The administration has been

effective at getting U.S. trading partners to the negotiating table, and the time is right to push for market access. Our aim is to ensure the Office of the U.S. Trade Representative and USDA trade-policy experts have our issues front-of-mind when they are hammering out agreements and protocols.

"We need some help from APHIS to elaborate the documentation mechanism because right now, it's not something that is standardized," he says. "In Tunisia, we can bring in hides, but we can't bring in feed inputs. And then for Morocco, Senegal, Côte d'Ivoire, Ghana and Kenya, there's really a whole range of different import requirements or feed restrictions.

"Other markets in sub-Saharan Africa show potential with almost \$40 million in imports of rendered products, but the U.S. market share is only about 5%, likely due to unknown or murky import requirements," Meredith adds. "One of the areas we're working toward is to facilitate more transparency, standardization and simplification for these types of requirements."

NARA is also developing a trade dashboard for Africa to map rendered product and feed ingredient flows. This dashboard will include country-level insights like import volumes, trends and regulatory shifts for markets with high export potential along with key macroeconomic and logistic indicators. Among other factors, the data will help track U.S. trade performance and policy impacts over time.

"Africa remains a region of high potential, and the dashboard allows users to zoom in on specific countries to assess import volumes, supplier trends and regulatory shifts," Meredith says. "This will enable NARA to better target in-country efforts, optimize engagement strategies and allocate resources more effectively."

Obviously, each African country has different needs, opportunities and challenges. Here's a brief summary of

Continued on page 12

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each market along with the latest developments as of press time. By the way, NARA members who are on the international development committee receive monthly reports from all of the association's regional consultants or directors (from Latin America, Asia, Europe and Africa) plus updates are given during NARA's fall convention and spring business meetings.

Morocco

The prime opportunity for U.S. renderers in Morocco is in pet food. After imports of pet food skyrocketed during the pandemic, businesses saw an opportunity to meet this demand by building a locally manufactured pet food market. The industry has been pushing now for several years to open the window for rendered product inclusion. After about two years of NARA working closely with the Moroccan industry and

regulators, partial market access for rendered animal proteins (excluding bovine and porcine) in poultry and aquafeed opened in March 2024.

A ministerial order is still pending for full implementation. Meanwhile, NARA is facilitating commercial connections between U.S. members and local stakeholders to support pet food market entry, expanding collaboration with a wider stakeholder group and staying in close communication with regulatory authorities in Morocco.

Côte d'Ivoire

Although there is virtually zero trade of rendered products in Côte d'Ivoire today, it's an open market — on paper, it's currently possible to import the entire range of rendered products. There are substantial commercial feed mills in the country and a lot of cross-border trade with neighboring markets. Some feed mills in Côte d'Ivoire have used meat and bone meal, but an application in 2023 for importing feather meal that was not approved.

The challenge for U.S. renderers in Côte d'Ivoire is going from having regulations on paper to getting the individual shipment approvals that are needed in order to actually get product into the country. However, regulators in Côte d'Ivoire have been very open with NARA's consultants, acknowledging that the local feed industry wants and needs these rendered products, but admitting they don't have the information or confidence to manage the risks. NARA has offered technical assistance with this, which was welcomed by regulators.

Draft regulations on rendered proteins have now been submitted to authorities and are under review. The recently signed MOU between NARA and MIRAH will bring about joint initiatives to facilitate trade in rendered animal proteins while advancing public and animal health objectives. Areas of cooperation include regulatory development and reform, government-to-government engagement, technical training programs, study tours, data sharing, market research and outreach to raise awareness of the safety and benefits of rendered products.

Tunisia

Opportunities for rendered products in Tunisia are found in both pet food and aquaculture. Tunisia has an existing



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NARA staff and members participated in a trade mission last June in Morocco. From left, Kent Swisher of NARA; Gregg Vincent from Fornazor; Kevin Baker with Darling Ingredients; a manager of Alf Sabel; Dana Johnson Downing of NARA; Dr. Yousef Mikou with Alf Sabel; Hayden Millward with Scoular; Sokayna El Allam with LixCap; Sophia Xue of Darling Ingredients; and Matthew Meredith of LixCap

rendering industry, and some of its rendered products are going into local pet food formulations. It's a small country so for these industries to grow, Tunisia must develop export markets. It does have some trading partners with exports to Turkey, the Middle East and, to a lesser extent, Egypt.

In order to grow its pet food industry, however, Tunisia will likely have to bring in more rendered products. Effectively no rendered product enters Tunisia today even though, as in Côte d'Ivoire, it's possible on paper. The pet food industry is too small yet to need it, but the potential is there. On the other hand, Tunisia has a large aquaculture sector that, at least today, is not using rendered products for aquafeed formulations.

NARA's plan is to spend more time in the country engaging with both sectors. The goal will be to jointly determine how to utilize Tunisia's open framework for introducing the country to rendered product so its aquaculture sector can increase productivity and to create opportunities in the pet food sector.

Senegal

When NARA started initial outreach to stakeholders in Senegal, the country had a total feed ban inclusion — similar to the one that Morocco had. Since then, however, Senegal elected a new president whose administration is growth-oriented, open to developing local industry and working with international partners to enhance competitiveness. Another issue was a general lack of knowledge about rendered products, but interest

has grown and technical workshops are being planned.

In January, during the International Protein Production & Processing Expo in Atlanta, several important Senegalese decision makers visited the NARA booth, including the president of the poultry industry in Senegal, the director of the largest feed mill and the head of the second largest feed mill along with its head nutritionist.

Dr. Charles Starkey, NARA's vice president of scientific and regulatory affairs, spoke with these visitors from Senegal and addressed their safety

concerns. Starkey detailed for the group the stringent requirements of the U.S. Food and Drug Administration as well as the Association of American Feed Control Officials to ensure the safety of rendered products. He also spoke to them about nutrition, for instance, pointing out that animals need animal fats in their diets to get complete amino acids.

As of July, there is already pending regulation in Senegal to update its framework, and NARA is working closely with the Interprofessional Poultry Association of Senegal and others to ensure the updated version of the regulation is in alignment with industry needs regarding rendered products. NARA plans to hold a stakeholder forum in Senegal this September to reconnect with key contacts and engage new players.

After the meeting at IPPE, one of the feed mill directors from Senegal said, "NARA, you need to become evangelical about using rendered products. This makes a lot of sense." That sentiment is sweet music to the ears of U.S. renderers, who look forward to partnering in the progress of so many African feed-related industries. **R**

Editor's Note: For more information about NARA's work in Africa, contact Dana Johnson Downing at ddowning@nara.org.



The July signing of a landmark MOU between NARA and Cote D'Ivoire's MIRAH included from left, Joshua Neiderman of the American Soybean Association; Dr Moussa Traoré with MIRAH; Ambassador Ibrahima Touré; Kent Swisher with NARA; Matthew Meredith of LixCap; and Juan Julio Gutierrez Rodriguez with USDA.



Luca Papa, vice president of Assograssi

Circular Economy: From Land to Sea, More Space for Animal Proteins

At its Rome conference, Assograssi called for the removal of restrictions on the use of PAPs from ruminants in aquaculture and a review of the constraints on their use in animal nutrition related to the BSE crisis over 20 years ago.

By Silvia Cerioli, Press Officer, Assograssi

Assograssi, the Association of Producers of Fats and Proteins of Animal Origin in Italy, held a conference in May named “From Land to Sea: Animal Proteins as a Resource for Efficient and Sustainable Aquaculture.”

Assograssi is an associate member of Assitol, the Italian Olive Oil Industry Association, which is affiliated with Confindustria — the general confederation of Italian businesses and services. It represents about 80% of rendering in Italy — a sector that gives a second life to by-products from meat processing under the “no waste” principle, upcycling them to produce detergents, fertilizers, pet food and feed for farm animals.

Data from 2024 describes a solid rendering sector as companies processed 1.427 million tons of animal by-products, generating over 700 million euros (roughly \$821 million) in revenue. The sector could improve in sustainability and profitability, however, if the EU eased bans still in place on the use of processed animal proteins (PAPs) in animal feed, according to Assograssi.

Conference attendees included Assograssi members and representatives from associated and institutional sectors. Speakers emphasized how benefits of expanding the use of PAPs — especially from ruminants — could positively impact Italian aquaculture by lowering production costs, improving nutritional products, increasing sustainability across the entire supply

chain and reducing dependence on imports. Furthermore, the association supports broadening the application of PAPs to all segments of animal nutrition and finally overcoming bans related to the bovine spongiform encephalopathy (BSE) crisis from over 20 years ago to make production processes more efficient and increase the competitiveness of the entire Italian meat sector.

“Thanks to the experience and know-how of our companies PAPs are of high quality, entirely the result of a well-established circular economy system that provides the market with raw materials for feed under strict controls,” said Assograssi President Paolo Valugani. “Yet, in Europe — where animal proteins are much safer from a health perspective than elsewhere — the restrictions imposed during the BSE crisis are even more stringent than those set by the World Organization for Animal Health.

“[This is] a true paradox, considering that today the risk of BSE in the EU is considered negligible, thanks to the biosafety system built by the rendering sector. The pandemic and subsequent international tensions have highlighted the issue of feed security — the safety of supply chains,” Valugani added.

For this reason, Assograssi has for years been calling to rewrite the rules, removing the feed ban — a set of restrictions that currently allows the use of transformed animal proteins only in certain segments of animal nutrition. In this context,

aquaculture is a sector with great growth potential — over 400 million euros (nearly \$470 million) in revenue in 2023 across 800 production sites throughout Italy — in which the use of animal proteins is already underway. In fish farming, nonruminant PAPs (from poultry and pork) is already used. However, current quantities are insufficient to meet the demand for feed, leading to reliance on vegetable proteins and fishmeal, which Italy and Europe are forced to import.

“A broader use of PAPs would help reduce imports and increase the economic sustainability of the sector,” Valugani said. “In Europe, this is increasingly being requested.”

An example is Norway, where aquaculture is a major economic sector. The national food safety agency recently wrote to the European Commission, citing scientific data confirming the minimal risks from BSE and requesting a new assessment from the European Food Safety Authority, on the current situation.

Fish consumption, recommended by nutritionists for its lightness and lower caloric content has increased significantly in recent years. In Italy, the annual per capita consumption of fish averages around 30 kilograms (66 pounds), which results in the country’s reliance on imports — 75% of the fish on Italian tables comes from abroad — and on aquaculture.

This sector was highlighted by Andrea Fabris, general director of the Italian Fish Farmers Association (API). “Aquaculture, and in particular fish farming, plays an important role in providing a food source with high nutritional value, as also affirmed by the Food and Agriculture Organization of the United Nations,” he said. “The availability of raw materials derived from circular economy processes can further enhance the sustainability of our activity. The constant control and traceability of PAPs ensure food safety, contributing to the improvement of feed formulations that can increasingly meet the physiological and welfare needs of farmed fish. Another achievable goal is the growing social acceptance of aquaculture, which can meet consumer demands and preferences.”

Lea Pallaroni, general director of the National Association of Animal Feed Producers (Assalzoo), added, “Access to a wider range of protein raw materials is now a strategic priority for the feed sector. In this context, and in light of European regulations governing their production, PAPs represent not only a safe and valuable resource, but an essential ingredient — especially considering that Italian aquaculture is mainly focused on carnivorous species.”

While maintaining the requirement — so far ensured by legislation — that any regulatory opening must be based on scientific evidence safeguarding both animal and consumer safety, extending the use of PAPs from ruminants would bring a twofold benefit: increased availability of the product and simplification in the use of PAP from pigs as well, thereby reducing dependence on imported protein raw materials such as fishmeal and soybean meal.

The experience of reopening the use of PAPs from pigs and poultry after 10 years have passed between the regulatory change and their actual implementation demonstrates the importance of large-scale retail’s early involvement to share a common path forward. In the face of European constraints, competition from non-EU countries severely penalizes the Italian rendering industry.

“Unable to count on adequate consumption, we export ruminant PAPs all over the world,” noted Dario Dinosio,

Assograssi’s deputy vice president. “Our fish farmers, on the other hand, have to suffer foreign competition and also spend more due to imports. Yet, replacing fishmeal and vegetable proteins, which are currently predominant in aquaculture feed, would have strong benefits on the industry’s balance sheets. Thanks to ruminant PAPs, aquaculture could count on greater availability of raw materials. This would benefit not only rendering companies and feed producers but would also reduce final costs for fish farmers, making their business more sustainable and profitable.”

The widespread use of ruminant proteins would also strengthen the circularity of the rendering and aquafeed sector.

“The advantages are many and obvious,” explained Luca Papa, the vice president of Assograssi. “There would be greater independence from imports, a lower carbon footprint — therefore greater environmental sustainability — and, in general, much lower production costs for the entire PAPs supply chain if we could count on greater quantities of raw materials for feed produced in Italy and not imported.”

However, Papa also reminded the audience, “It is necessary to explain the sustainability of these products to the consumer with adequate labeling describing our companies’ commitment to sustainability and the circularity of our production processes.”

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Paolo Valugani, president of Assograssi



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EFPRA 2025 Congress Held in Latvia

For the first time, Riga, Latvia, hosted the 23rd Congress of the European Fat Processors and Renderers Association, bringing together over 500 experts, entrepreneurs and policymakers from more than 40 countries. The focus of the event was on sustainability solutions, innovation and the future of the circular economy.

This is the most significant annual event in the European rendering industry and hosting it in Latvia underscores the country's capacity to serve as a valuable partner in shaping Europe's green economy. The congress was organized by LINEN, a Latvian family-owned rendering company. Viktors Valainis, Latvia's minister for economics, opened the meetings and emphasized that bioeconomy and circularity are key growth opportunities in his country.

"Riga has become one of the global hubs for dialogue on sustainability, innovation and the circular economy," Valainis said. "I am pleased to see an event of this scale taking place in Latvia — a country that has clearly chosen a path toward a green, digital and competitive future. Our bioeconomy and circular solutions are not just strategic documents — they are already being applied in real business and innovation. Latvia is ready to be a reliable partner on the path toward a greener and smarter future."

Opportunities Identified for European ABPs

There are several exciting opportunities emerging for the European rendering industry, but there is still work to do to make them a reality.

"Overall, an excellent congress with lots of good news," said Robert Figgner, the president of EFPRA. "If the recent and proposed changes enter into force, this would be a big step forward for our industry. However, there is still some distance to go. We have to make the case and work closely with our national and European representatives. We also need to continue providing evidence that our products are healthy, sustainable and safe. And finally, connect with companies, industries and even countries that have strong potential use cases for animal by-products (ABPs)."

Sustainable aviation fuel (SAF) is a good example of how new legislation has yet to create the anticipated demand for rendered fat. The ReFuelEU Aviation regulation has set a minimum — and initially not overly ambitious — supply mandate for SAF in Europe, starting with only 2% in 2025 and

Continued on page 18

increasing to 70% in 2050. According to Figgenger, EFPPRA members are beginning to understand this market and develop strategies to participate more effectively.

Perhaps the biggest topic is a proposed review of the transmissible spongiform encephalopathies (TSE) regulation with the intention of aligning European ABP rules with World Organization for Animal Health standards. This would represent a significant shift in legislation and might change the landscape of rendering in the EU.

More broadly, it would see rules and uses of ABPs in Europe being much more similar to the rest of the world. At present, European regulation is far more proscriptive on using ABPs, which is harming economic and environmental performance.

"The proposed review of TSE legislation is a positive step, but it is still in the early stages," Figgenger added. "I cannot emphasize enough that we are at the start of this process and our industry must work together to achieve a positive result. Thinking specifically about feed, we need to gather evidence on the value of specific animal proteins in feed for different species of fish as well as pig and poultry, which was discussed in both Hans Boon's and Luciano Pinotti's presentations."

EFPPRA's high-level objective is to highlight how ABPs contribute to circularity and sustainability in the food system. These are key topics to increase the visibility and positive reputation of the rendering industry in Europe. EFPPRA is a member of the Circular Feed Platform, an industrywide initiative to improve the sustainability of animal feed production. This was illustrated at congress with a presentation from Arnaud Bouxin, director of the European Feed Manufacturers Federation (FEFAC),

a trade association for the European compound feed industry.

EFPPRA's contribution to circularity in feed is through better valorization of animal proteins both in Europe and for export markets. In the EU, removing the prohibition on using ruminant proteins in nonruminant livestock feed for pigs, poultry and aquaculture is a key target.

For export markets, EFPPRA has already taken steps to improve links with countries in Asia. In November, EFPPRA held successful discussions on trade and cooperation with a Vietnamese delegation, including the deputy minister for agriculture. This was followed up in March with a return visit to Vietnam and exhibiting at the VIV Asia trade show in

Thailand to develop contacts with the Asian feed industry.

"From the work we have done so far, countries in Asia are interested in a range of European proteins," Figgenger said. "We would like to develop markets for Category 2 processed animal proteins (PAPs) that can be exported and used in third countries for a range of purposes including feed, in line with local regulations."

EFPPRA's congress returns next May when it will be hosted by the National Association of Animal Fat and By-Product Processing Industries (ANAGRASA), the Spanish rendering association, on the island of Tenerife. **R**



Robert Figgenger, EFPPRA president

An advertisement for Honkajoki Group. The background is a close-up of a green leaf. On the left is the Honkajoki Group logo, which consists of a stylized 'H' made of three connected loops, with the text 'Honkajoki Group' below it. To the right of the logo, the text reads: 'Specialized consulting and engineering services for the rendering industry'. Below this, in a larger font, it says: 'Applying the top business, processing, and operation concepts ensuring best value for by-products'.



Tariff Tensions and Trade Promotion: A Tumultuous Summer for Global Markets

In early July, President Donald Trump reignited trade tensions by issuing 22 letters outlining new tariff measures aimed at reducing the U.S. trade deficit and pushing back against nontariff barriers imposed by America's trading partners. Shared publicly via Truth Social, these announcements mark a significant shift in the U.S. approach to global trade, particularly affecting many South Asian nations.

The letters follow Trump's earlier reciprocal tariff policy announcement April 2, with the updated rates varying based on trading partners' level of engagement over the past three months. Originally scheduled to take effect July 9, the administration has now extended the implementation deadline to Aug. 1, following a new executive order.

According to a White House statement, companies seeking to avoid these tariffs must establish manufacturing operations in the U.S. This "America First" economic stance is framed as a means to boost domestic job creation, particularly in the manufacturing sector.

While this tariff rhetoric has generated uncertainty, U.S. exports of rendered animal protein meals have remained relatively resilient. Year-to-date (YTD), exports are down just 5% overall. Notably, Vietnam has emerged as the top importer of U.S. rendered protein meals, with exports to the country up 6% compared to the same period last year. Indonesia is now the second-largest market, with a strong 14% increase in YTD exports.

However, the picture is less positive in China. U.S. exports to

China have dropped by 31% this year, and U.S. market share in China has declined to 62% YTD in 2025 compared to 76% for the same time period in 2024. This shift underscores the volatility of global trade dynamics and the critical importance of maintaining diversified export markets.

There are also positive developments on the trade promotion front. At the 2025 U.S. Agricultural Export Development Council Global Attaché Policy Forum and Consultations, Agriculture Secretary Brooke Rollins highlighted the administration's renewed commitment to export promotion.

The recently passed "big, beautiful bill" includes the creation of a Supplemental Agricultural Trade Promotion Program, allocating an additional \$285 million annually starting in the 2027 fiscal year. This funding supplements the longstanding Market Access Program and Foreign Market Development program, which together receive about \$235 million annually.

As the rendering industry looks ahead, these developments are a reminder of both the challenges and opportunities inherent in today's global trade environment. While rising protectionism and retaliatory threats introduce risk, enhanced trade promotion efforts offer a vital counterbalance — especially for sectors like rendering that rely on access to diverse international markets.

The North American Renderers Association remains committed to advocating for policies that expand market access, reduce trade barriers and ensure a fair and predictable global trading system for all American agricultural products, including rendered goods.

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“We make it a priority to attend the NARA Annual Convention every year because we get to interact with our customers in person as well as discuss what is currently happening in the industry. The conference is set up really well with speakers, breakout sessions, a tradeshow portion and social events.”

— Mia Ivetić, Corporate Vice President, Uzelac Industries, Inc.

DETAILS ON THE WEB: Visit www.convention.nara.org



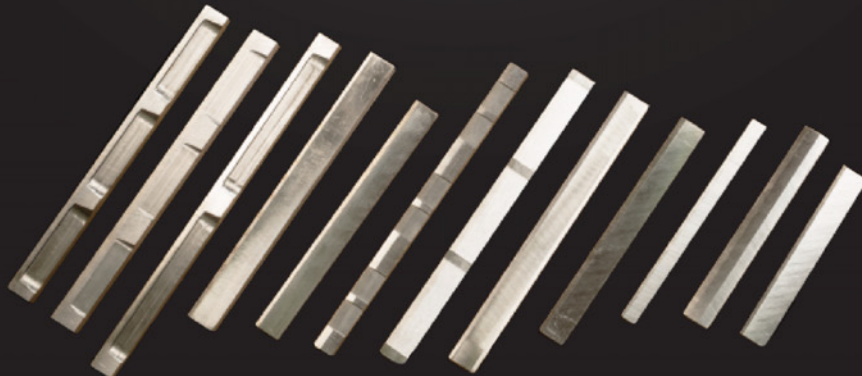
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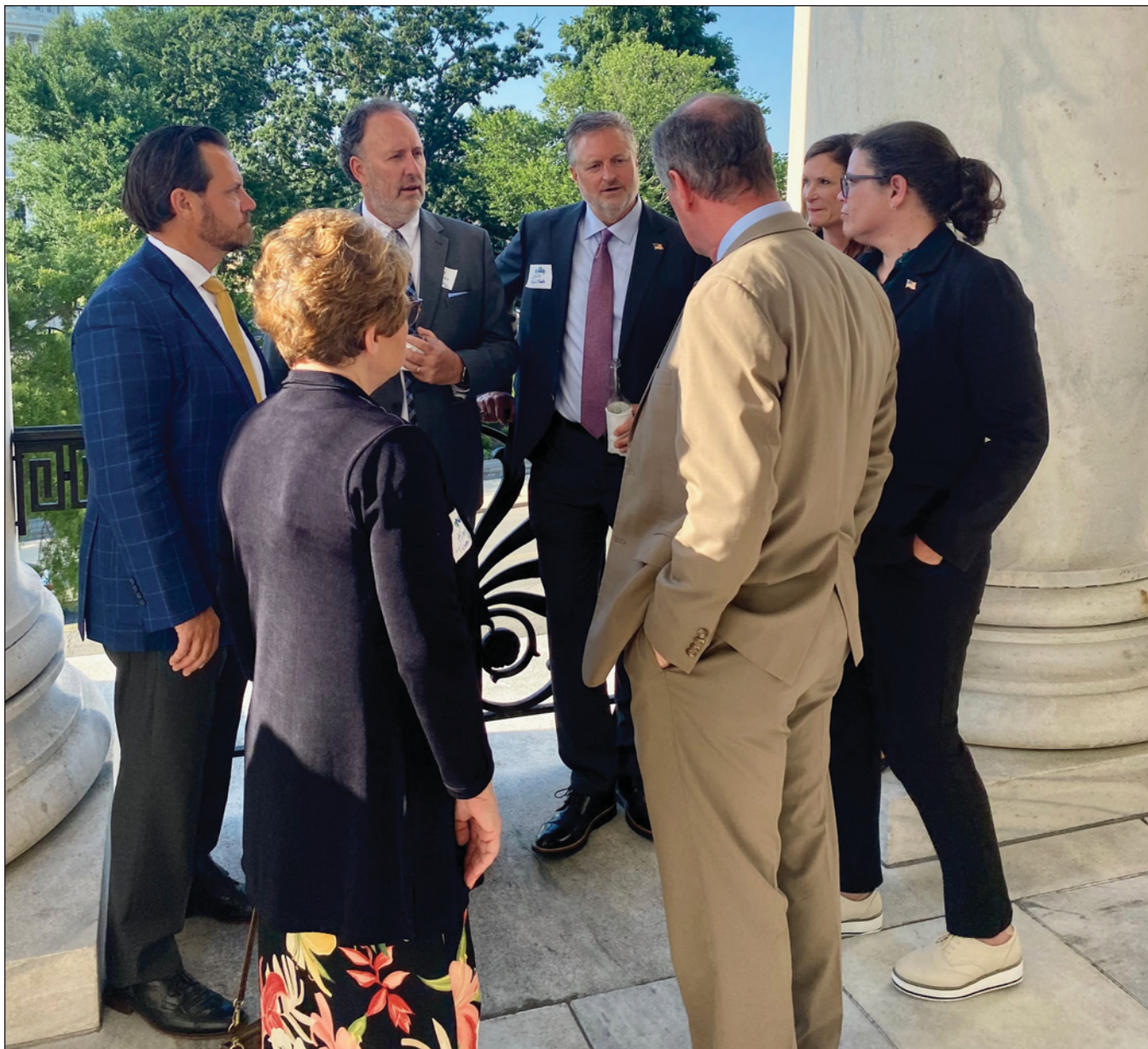


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From left, Doyle Leefer of National Beef; Kim Broekemeier, NARA second vice chair; Mike Glenn, NARA chair; Jeff Neil of Tyson Foods; Rep. Tracey Mann of Kansas; Dana Downing, NARA senior vice president of international programs; and Megan Fulmer of Darling Ingredients.

Renderers Engage With Lawmakers During Fly-In

By Amy Moulden, NARA Director of Operations and Membership

Members from across the country joined the North American Renderers Association on Capitol Hill for the annual Congressional Fly-In June 23-25 where they engaged directly with lawmakers and their staff. The event served as an important platform for the rendering industry to advocate for its top policy priorities, including sustainability, international trade, biofuels and regulatory reform.

Over the course of the three-day event, NARA members met with dozens of U.S. senators, representatives and congressional staffers, emphasizing the essential role rendering plays in supporting a sustainable food system, reducing waste and strengthening rural economies. These conversations highlighted the industry's commitment to innovation and environmental stewardship as well as the need for

policies that promote continued growth and global competitiveness.

A highlight of the Fly-In was a special congressional reception attended by key allies of the rendering and agricultural communities. NARA was honored to welcome Rep. Tracey Mann, R-Kansas, as a featured speaker. A strong advocate for rural America and a champion of agriculture, Mann offered valuable insights and expressed



Rep. Doug LaMalfa with Tristan Daedalus of Baker Commodities.



Mike Glenn, Rep. Gary Palmer of Alabama, Micah Salsman and Franklin Moore, both of BHT ReSources.



Rep. Tracey Mann was the featured speaker at the Fly-In congressional reception.

his continued support for the rendering industry's mission.

"We are especially grateful to Rep. Mann for joining us and for his ongoing commitment to rendering, agriculture and rural communities," said NARA President Kent Swisher. "His leadership is instrumental as we work to ensure our industry remains a vital part of the agricultural supply chain."



Matthew Burkhardt, Rep. Scott DesJarlais of Tennessee and Mike Glenn.



Kent Swisher, NARA president and CEO, with Rep. Carol Miller and Mike Glenn.

NARA also extended its sincere thanks to Reps. Doug LaMalfa, R-California, and Carol Miller, R-West Virginia, for attending the reception and engaging with members on pressing industry issues. Their participation reflects the broad congressional support for the rendering industry and its contributions to sustainability, biosecurity and economic resilience.

The annual Fly-In remains a cornerstone of NARA's advocacy efforts, reinforcing the importance of direct member engagement in federal policymaking. As Congress continues to shape legislation impacting agriculture and the environment, NARA will remain a trusted voice in Washington, D.C., working to advance policies that benefit the rendering industry and the communities it serves.

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Reflections From the NARA Central Region Convention

Story and Photos by Jacki Kaluzny Vollmer
of Kaluzny Bros. Inc.



Members and partners of the rendering industry gathered June 10–12 at The Abbey Resort in Lake Geneva, Wisconsin, for the annual North American Renderers Association Central Region Convention. The event offered attendees a rich blend of education, technology, networking and forward-looking dialogue.

The convention opened with a keynote from motivational speaker Matt Brauning, whose talk, “The Firebox Principle: Unlocking Motivation That Lasts,” set an energizing tone. Brauning’s presentation centered around uncovering the secret to building authentic, enduring motivation that fuels performance and drives success. As a takeaway, participants uncovered which of the seven firebox motivational drivers best suited their leadership style — a helpful tool in understanding oneself and how to maximize drivers within their own teams.

Andrew Harker from The Russell Group tackled trade policy, tariffs and government reforms, including the Department of Government Efficiency. He went into detail on the status of the budget negotiations, “Make America Healthy Again,” and the Farm Bill’s progress.

The afternoon highlighted advances in rendering technology. Greg Rawe of The Dupps Co. showcased cutting-edge equipment innovations helping processors improve efficiency and quality. Steve Pennington of Flottweg presented developments in decanter centrifuge and separation technologies.

Dr. Charles Starkey, representing NARA and the Fats and Proteins Research Foundation, provided updates on FPRF’s ongoing research projects and NARA’s scientific services work. The first day then wrapped with a vendor tabletop event, giving participants a chance to explore new offerings from suppliers and build relationships with them and their peers over cocktails and appetizers.

The second day began with Dana Johnson Downing, NARA’s senior vice president of international programs, providing an update on the association’s communications and educational outreach. The session highlighted both domestic and international work to raise awareness of rendering’s role in sustainability and food systems. She then switched hats to give updates on the International Marketing efforts of NARA, including new efforts in Africa.

A standout panel moderated by Sanimax’s Mike Karmen followed, featuring Dr. Darlene Konkle, Wisconsin state veterinarian, and Dr. Erik Jopp, assistant director at the Minnesota Board of Animal Health. Their panel discussion addressed:

- Biosecurity challenges.
- The ongoing response to avian influenza.
- Inspection protocols.
- Future expectations for animal health oversight.
- Ways renderers can better partner with their local boards of animal health and other areas of opportunity between renderers and the state.

Mark Lies of the Seyfarth Shaw law firm offered critical updates on employment law and Occupational Safety and Health Administration compliance — a session especially valued by professionals in the room with operations and human resource responsibilities. Lies and his Seyfarth Shaw partner, Adam Young, were perennial speakers at the convention long before they started writing the “Labor and the Law” columns that appear in every issue of *Render*. Their real-life examples of everyday scenarios that can happen to renderers continue to be an important reinforcement of the responsibility we have regarding the health and safety of our employees.

The day’s speakers concluded with Magnattack’s Kevin Baker introducing attendees to the latest in magnetic separation solutions — a niche but essential technology in rendering facilities. All of the speakers elicited tremendous audience response with plenty of questions, comments and observation relating to operations.

Social events during the convention included a golf tournament, fishing on Lake Geneva, and a dinner cruise aboard Lake Geneva Cruise Lines — a scenic highlight that fostered relaxed connection and informal dialogue over dinner, drinks and historical background on the Geneva Lake area. Golf and fishing accomplishments were recognized onboard with appropriate prizes.

The final morning featured a business meeting of the NARA Central Region, offering updates on organizational activities and governance before closing the convention. At that meeting, the region voted to contribute monies to FPRF specifically for research on hides, given their extremely depressed prices and future market outlook for leather uses. The region would also like to challenge other NARA regions to join in funding this endeavor and, possibly, including other associations as well.

The 2025 Central Region Convention showcased the strength of the rendering community: its technical expertise, commitment to research and deep engagement with issues that matter, from global trade to public health to worker safety.

NARA extends its gratitude to Central Region President Robert Kaluzny and Jacki Kaluzny Vollmer of Kaluzny Bros. Inc. for organizing the event. A special thanks goes out to all speakers, sponsors and attendees for their contributions. We enthusiastically look forward to continued momentum with next year’s convention tentatively scheduled at the Eagle Ridge Resort and Spa in Galena, Illinois, June 10-12, 2026, under the leadership of the new NARA Central Region President Ryan Berkey of Darling Ingredients.

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Turning Point

Two major policy developments unfolded in June and July that together are expected to lift the U.S. biobased diesel sector out of its prolonged slump. The industry has been struggling since late last year due to federal policy uncertainty. Specifically, in 2023, the Biden administration set severely low renewable volume obligations (RVOs) for biobased diesel three years in a row (2023-2025), putting the brakes on a rapidly growing sector fueled by petroleum company investments in renewable diesel and sustainable aviation fuel (SAF) production. The U.S. Environmental Protection Agency has also been long overdue on issuing its next RVO proposal, exacerbating uncertainty and further chilling demand.

In addition, the \$1-per-gallon blenders tax credit expired Dec. 31. The incentive had lapsed on numerous occasions over its 20-year history, but Congress always retroactively reinstated it. This time, however, was presumed to be the blender credit's final sunset as its replacement waited in the wings — the clean fuel production credit known as section 45Z, which was originally passed in the Inflation Reduction Act of 2022.

The problem with this is there are no implementing regulations in place for 45Z from the U.S. Department of the Treasury. The incentive's rules are "half baked" as Pete Moss with Frazier, Barnes & Associates described it — the credit favors SAF over on-road fuels like biodiesel, it punishes biofuels made from domestic crop-based fuels and, for many biodiesel

producers, the value of 45Z will be just a fraction of what the blenders tax credit provided.

As federal policy held its foot on the throat of biobased diesel producers, California Air Resources Board passed revisions to its Low Carbon Fuel Standard that, among other changes, put a 20% companywide cap on biofuels from soybeans, canola and sunflowers, further disincentivizing the once-thriving ramp up in capacity buildout. While California's LCFS modifications, which went into effect July 1, are viewed as restrictive for conventional biobased diesel producers, recent policy developments at the federal level are expected to reinvigorate the U.S.'s languishing biobased diesel manufacturing sector.

EPA Proposes 2026-2027 RVOs

EPA issued June 13 its overdue and much-anticipated RFS proposal for 2026 and 2027, including several important changes to the program. Unlike all previous proposals, which provided biobased diesel RVOs in gallons while other biofuel RVOs were issued in renewable identification number (RIN) credits, EPA is now issuing all RVOs in RIN equivalents. One RIN is equal to one ethanol-equivalent gallon of renewable fuel.

For 2026 and 2027, EPA is proposing to set the biobased diesel RVOs at 7.12 billion RINs and 7.50 billion RINs, respectively. The agency projects the volume equivalent of its RIN-based biobased diesel RVO to be approximately 5.61 billion gallons for 2026 and

5.86 billion gallons for 2027, up from 3.35 billion gallons for 2025 set by the previous administration. For total advanced biofuels under the RFS program, EPA is proposing 9.02 billion ethanol-equivalent gallons for 2026 and 9.46 billion ethanol-equivalent gallons for 2027. This is up from 7.33 billion ethanol-equivalent gallons in 2025 set by the previous administration.

“There are lots of details and questions about the calculation of those volumes,” said Paul Winters, Clean Fuels Alliance America’s director of public affairs and federal communications.

EPA noted that its volume estimates account for the projected impacts of the proposed RIN reduction for imported renewable fuel and renewable fuel produced from foreign feedstocks, as well as the proposed revised equivalence value for renewable diesel. The agency is proposing to modify the value of a RIN based on whether the biofuel is derived from domestic or foreign sources. Specifically, EPA is proposing to amend RFS regulations so that foreign biofuels and feedstocks would only generate 50% of the RIN value relative to domestic biofuels and feedstocks.

In addition, EPA is reducing equivalent values of domestic renewable diesel, renewable naphtha and SAF to properly account for the fossil-derived hydrogen found in hydrotreated

Proposed Volume Requirements 2023 – 2027 (billion RINs)

Billion RINs	Volume Requirement Established in Set 1 Rule			Proposed Volume Requirements	
	2023	2024	2025	2026	2027
Cellulosic biofuel	0.84	1.09	1.38	1.30	1.36
Biomass-based diesel (RINs)	4.51	4.86	5.36	7.12	7.50
Biomass-based diesel (gallons) – projected	2.82	3.04	3.35	5.61	5.86
Advanced biofuel	5.94	6.54	7.33	9.02	9.46
Total renewable fuel	20.94	21.54	22.33	24.02	24.46
Conventional (implied mandate)	15.00	15.00	15.00	15.00	15.00

biofuels, noting that biodiesel RIN values had long been lower due to its fossil-derived methanol content.

“Specifically, we are proposing to reduce the equivalence value for renewable diesel ... to 1.6,” EPA stated. “We are also proposing to specify equivalence values of 1.4 for renewable naphtha and 1.6 for renewable jet fuel. Equivalence values for these fuels are not currently specified in [the regulations] but are instead determined on a facility-by-facility basis using an equation ... Previously approved equivalence values for

Continued on page 28

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naphtha range from 1.4 to 1.5 with the majority approved at 1.5, and for renewable jet fuel range from 1.6 to 1.7, with the majority approved at 1.6.”

EPA now projects the average number of RINs generated for biobased diesel will be 1.27 and 1.28 RINs per gallon in 2026 and 2027, respectively, but the agency added that these numbers are not proposed standards and are presented for illustrative purposes only.

EPA’s biobased diesel volume projections for 2026 and 2027 exceeded industry expectations. The projected volume proposal for 2026 is 7% higher than the 5.25 billion gallons associations like Clean Fuels and even the American Petroleum Institute were seeking.

Trade groups lauded the pending RVOs. The American Soybean Association called the proposed biobased diesel volume increases “historic” and noted the 67% increase from 2025 to 2026. Clean Fuels referred to the proposal as “a robust step-change” in terms of RVOs and obligation percentages. The Iowa Biodiesel Board said the record-setting targets are “a major win” for domestic biodiesel producers. Missouri Soybean Association President Renee Fordyce said the increased biobased diesel volume targets provide much-needed market certainty for farmers, processors and biofuel producers, allowing for long-term planning and investment.

EPA is proposing several additional changes to the RFS program, including removing e-RIN eligibility (RINs produced from renewable electricity for electric vehicles); clarifying that RINs cannot be generated on pure biodiesel used for process heat or power generation; and several others.

The agency proposed setting the total RFS blending level at 24.02 billion gallons — a record amount — and plans to keep the corn-ethanol volume at 15 billion gallons. Comments on the proposal must be received by EPA on or before Aug. 8.

45Z Modifications Signed Into Law

President Donald Trump’s signature piece of legislation — the “big, beautiful bill”—was signed into law July 4 to implement his agenda with Republicans in control of the White House and both chambers of Congress. The tax and spending bill, which made it through slim Republican margins in the House and Senate under the budget reconciliation process, is perhaps best known for permanently extending the Trump tax cuts of 2017 as well as codifying his campaign promises of no taxes on tips and overtime. The massive bill also includes significant modifications to 45Z.

To begin with, the new law pushes back the expiration of 45Z for two years. The incentive was set to expire at the end of 2027. While earlier drafts of this legislation included four-year extensions through 2031, the final version includes a two-year extension, sunsetting the provision at the end of 2029. Importantly, the law enables taxpayers to transfer 45Z credits through 2029, providing forward-looking certainty and

enabling small producers to fully access the value of the credit.

In response to a massive influx of questionable U.S. imports of used cooking oil from China, the new law restricts 45Z eligibility to biofuels made from feedstocks originating in North America. Since 2022 when the 45Z credit first emerged, it was always limited to domestic producers, which was a major change from the blenders credit. Now, eligible biofuels must be produced in the U.S. and the feedstock must have originated in the U.S., Canada or Mexico.

The measure also addresses penalties imposed on biofuels made from crop oils by eliminating indirect land-use change (ILUC) in modeling greenhouse gas (GHG) emissions. Most U.S.-based agriculture and biofuel groups say these two provisions are pivotal to reviving domestic biodiesel and renewable diesel production from feedstocks like soybeans or canola. One group, however, is not pleased with the final feedstock requirements.

“We are disappointed that the final reconciliation bill restricted foreign feedstocks under 45Z,” said Michael McAdams, president of the Advanced Biofuels Association. “We will continue to advocate for both domestic and international feedstocks to ensure advanced biofuel refineries and biorefineries have the resources they need to maximize production and contribute to America’s energy dominance agenda. We turn our attention now to the EPA’s work developing its final RVOs for 2026 and 2027. The proposed rule currently calls for a 50% reduction in RIN value for fuels made with foreign feedstocks, which will only hurt American biorefineries and their workers. We urge the EPA to reconsider this current restriction and support American advanced biofuel production.”

Another major change to 45Z is the elimination of the SAF premium. As passed in the IRA, SAF was eligible for a maximum of \$1.75 per gallon while on-road biofuels like biodiesel could only claim up to a maximum of \$1 per gallon.

For biodiesel producers, one very important part of the new law is an extension of the small agri-biodiesel producer credit, as well as increasing its value from 10 cents to 20 cents per gallon on the first 15 million gallons. Small biodiesel facilities with production of 60 million gallons per year or less can access this credit in addition to 45Z, and the same transferability rules apply. The small agri-biodiesel producer credit is extended for the rest of 2025 through 2026. Although the modifications to 45Z outlined above are not set to go into effect until 2026, the extension of the small agri-biodiesel producer credit is immediate.

“Clean Fuels thanks Congress for working overtime to provide certainty for biodiesel and renewable diesel producers — especially small companies — so they can resume production and industry growth,” said Kurt Kovarik, Clean Fuels’ vice president of federal affairs. “Clean Fuels especially thanks Sen. Chuck Grassley, R-Iowa, for securing an enhancement to the small agri-biodiesel producer credit to help small producers as they make the transition to the 45Z clean fuel production credit. While the extension of the 45Z credit with transferability through 2029 provides some immediate stability, our industry continues to urge the treasury department to promptly propose and finalize clear, reliable rules for the credit.” **R**

Championing Global Growth: Kevin Baker Retires

By Kent Swisher, NARA President and CEO, and Dana Downing, Senior Vice President of International Programs



It's rare to encounter a leader whose influence spans not only the internal operations of an organization but reverberates across an entire industry. Kevin Baker is one such individual. During his 17-year tenure in the rendering industry — first with Valley Proteins and later with Darling Ingredients — he became a driving force in shaping international trade strategies and elevating North American renderers' voice on the global stage.

As staff leads to the North American Renderers Association's international market development committee (IMDC), we had the privilege of working side-by-side with Kevin. His dedication to international market expansion, clarity of thought and commitment to collaborative progress made him an indispensable asset — not only to the committee but to the broader industry. His leadership as IMDC chair for nine years was transformative.

Kevin's journey in rendering was grounded in operational excellence, but his true influence blossomed in the arena of international market development. Representing two highly respected companies in the industry — Valley Proteins and later Darling Ingredients —

he brought technical insight, business acumen and diplomatic savvy to his work on the IMDC. His understanding of trade dynamics and regulatory frameworks enabled him to engage with agencies like the U.S. Department of Agriculture's Foreign Agricultural Service, Animal and Plant Health Inspection Service and the Canadian Food Inspection Agency with credibility and effectiveness.

His tenure coincided with a time of great change and opportunity for the rendering industry, particularly in overseas markets. Kevin's leadership helped shape strategies that not only opened new export channels but also protected and enhanced existing ones. He understood the intricate balance between promoting the North American brand and navigating evolving international regulations — a skill that set him apart.

Steering IMDC Toward Strategic Innovation

Under his chairmanship, the IMDC evolved into a dynamic think tank. The committee, already a vital mechanism within NARA, took on expanded influence in shaping export policies and priorities. Kevin championed a proactive approach that emphasized innovation, responsiveness and collaboration.

He believed that active participation in the committee wasn't just about attending meetings — it was about contributing to real outcomes. Whether it was building consensus on best practices, providing critical input on market access issues, or supporting the development of education and trade missions, Kevin was always engaged and forward-looking.

He cultivated a culture of shared purpose and open dialogue within the IMDC. Quarterly and spring meetings, the fall convention, and special working groups became fertile ground for problem-solving and cross-sector collaboration. Kevin ensured these engagements weren't just formalities — they were catalysts for industry-wide advancement.

Lasting Influence on Industry, Colleagues

Kevin's leadership extended beyond committee work. He mentored emerging leaders, fostered international relationships and set a standard for professionalism that inspired those around him. As an advocate for continuous learning and global thinking, he underscored the importance of aligning domestic capabilities with international demands — pushing the industry toward more sustainable and scalable growth models.

His commitment to excellence wasn't for optics or to boost his reputation. It was authentic. He modeled consistent, thoughtful leadership, follow-through and meaningful contributions. He brought humility to the table, never seeking the spotlight but always shining in his ability to get things done and elevate others in the process.

A Grateful Farewell, Forward Path

As Kevin transitions to the next chapter of his career, the legacy he leaves behind at NARA and within the IMDC is substantial. His nine years of service represent not just longevity but leadership, innovation and impact.

Kevin Baker reminded us that in any membership organization, there are those who participate primarily as beneficiaries content to receive the value that's already been built. Then there is a rarer kind — the investor. These are the people who lean in, contribute their time and talent, and help shape the very foundation that delivers value — not just for themselves, but for the entire industry and the public good.

Kevin was that kind of member. And through his leadership, he showed us just how powerful that investment can be. We thank him deeply for his contributions — and we look forward to building on the foundation he helped shape. **R**

Workplace Recordings and Eavesdropping: Limiting Criminal and Legal Liabilities

The ubiquity of smartphones and sensitive security cameras have made audio recording in the workplace more common. Some recordings may be accidental while others could be intentional attempts to secretly document workplace conversations. Both types of recordings can constitute felony violations of state criminal laws, unfair labor practices and sources of civil liabilities. State laws on recording conversations — often addressed as criminal eavesdropping and wiretapping — vary significantly. Employers must understand this legal landscape when assessing a range of recording issues.

1-Party Versus 2-Party Consent States

State laws are divided into one-party and two-party (or all-party) consent. One-party consent states allow a person to record a conversation as long as one party to the conversation (typically the person recording) consents to the recording. Most states, including New York and Texas, follow this rule. Two-party (all-party) consent states require that all parties to a private conversation must give their consent for a recording — failure to have all parties consent to a recording violates the laws. California, Florida, Pennsylvania and Illinois are some of the two-party consent states.

Recording someone without the necessary consent in a two-party state can result in criminal penalties, including fines or imprisonment. In Illinois, eavesdropping is at least a Class 4 felony. Recording can further expose the recorder to civil liability. In two-party consent states, employers generally do not use recording devices in the workplace such as audio components of security cameras.

What Employers Should Do About Secret Recordings

In a two-party consent state, if an employee secretly records conversations without consent from all participants, legal exposure is an issue. The employee may be in violation of the state's criminal eavesdropping or wiretapping laws as well as company policy prohibiting surreptitious recording.



This leaves the employer with three options: conduct an internal investigation, take appropriate disciplinary action if allowed by company policy and/or consider contacting legal counsel to evaluate civil or criminal action.

There are, however, limitations; if the recording relates to protected concerted activity under the National Labor Relations Act (discussed below), employers must tread carefully before taking disciplinary action.

In a one-party consent state, if the recording employee is a participant in the conversation, the act is generally legal — even if the other party is unaware. Note that workplace policies can prohibit recording of meetings, surreptitiously or openly. Employers may discipline employees for violating internal rules about recording, especially where confidentiality is at issue. Again, if the conversation relates to protected activity under NLRA, employers must approach discipline with caution.

NLRA Restrictions, Covert Recordings

NLRA protects employees' rights to engage in concerted activities for mutual aid or protection, including discussing wages, working conditions or unionizing efforts. When covert recordings are protected, decisions from the National Labor Relations Board have protected employees who secretly record conversations when the employees are "acting in concert for their mutual aid and protection," particularly when:

- The employee is gathering evidence of unlawful conduct such as harassment, discrimination or interference with labor rights.
- The recording is part of a broader effort to address or publicize workplace conditions.
- The employee is recording conversations about terms and conditions of employment.
- NLRB has upheld disciplinary actions where employees are not acting in concert for their mutual aid and

protection or the employer has an “overriding interest” to restrict the recording. For example, when the recording violates clearly communicated and lawful company policies, or it invades significant privacy interests such as recording confidential company information or trade secrets or recording private personal information.

Notably, in an aggressive NLRB decision during the Biden administration, the board determined that NLRA preempts state consent-to-record laws when employees are engaged in protected activity, meaning that an employee’s covert recording in a two-party consent state is protected when “acting in concert for their mutual aid and protection.”

Thus, while NLRA provides some cover, it does not give a free license to record illegally or in violation of legitimate and lawful workplace rules. Employers must tread lightly regarding employee discipline for secret recordings about protected activity, particularly concerning occupational safety and health.

Interviewee Rights

During inspections or investigations by government agencies such as the Occupational Safety and Health Administration, Equal Employment Opportunity Commission or the U.S. Department of Labor, employees have certain rights including refusal of participation in interviews and the ability to have a representative of their choice be present. Employees have the right to object to audio and video recording of their interviews. Their only obligation is to provide honest answers. When employees or their representatives object to recording, government investigators typically relent and instead take notes.

But do interviewees and employer representatives have the right to record interviews and interactions with government investigators? In one-party consent states, a person can typically record their conversation with an investigator without disclosing it. In two-party consent states, the investigator sometimes must consent to be recorded. Recording without consent in a two-party state could expose you to criminal liability — even if the conversation is with a government official.

In some states like Illinois, courts have created an exception to record police and some government investigators. We generally do not recommend recording government interviews. Instead, provide only honest answers to questions within the reasonable scope of the inspection. Management may take notes on their interview or comments by an investigator. Management notes are a more predictable and controlled format to document a conversation.

Best Practices for Employers

In two-party consent states, utilize security equipment that does not automatically record audio. Any recordings of video conferences should be made clear and explicit.

Establish clear policies relating to audio and video recording in the workplace. For example, adopt policies that prohibit unauthorized audio or video recording in the workplace. Provide clear and compelling reasons for the policy and include a carve out for employee rights under the NLRA.

Communicate these policies through a written handbook and training.

Stay informed about state law. Know whether your worksite is in a one-party or two-party consent jurisdiction. You may also need to understand the law where employees travel and record conversations.

Respond appropriately to suspected workplace recordings. Avoid unlawful retaliation if recordings relate to protected activity. Consult qualified counsel before disciplining employees.

Train management on NLRA and OSHA rights. Supervisors should understand employee protections under labor law and during investigations.

The recording of workplace conversations — whether by employees, employers or government agents — implicates a web of state laws and federal protections. Employers must address the issue with sensitivity and awareness of the risks. When in doubt, seek legal guidance to avoid missteps that could lead to criminal liability, civil suits, OSHA violations and unfair labor practice charges. **R**

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Render

2025 Media Kit

Render is the official publication of the North American Renderers Association, and the only magazine that covers the rendering industry on a global level. *Render* is sent to every member of NARA — that is 95% of renderers in North America — and VIPs from over 50 countries. They all count on *Render* for the best coverage of markets, regulatory and legislative issues, technology and research that impacts rendering. They also depend on the advertisements in *Render* to find products and services their businesses need. If you sell to renderers, this is where you reach the target audience — through a magazine they have trusted since 1972.

Rate Chart

*All rates per ad.

Ad Size	1-2 Issues	3-5 Issues	All 6 Issues	Ad Dimensions (Inches width x height)
Full Page	\$3,010	\$2,800	\$2,670	8.5 x 11 (1/8 inch bleeds)
2/3 Page	\$2,560	\$2,405	\$2,305	4.5 x 10
1/2 Page	\$2,405	\$2,275	\$2,185	7 x 4.875 4.5 x 7.375 (island)
1/3 Page	\$1,965	\$1,880	\$1,820	4.5 x 4.875 (horizontal) 2.125 x 10 (vertical)
1/4 Page	\$1,835	\$1,760	\$1,720	7 x 2.125 (horizontal) 4.5 x 3.75 (vertical)

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Preferred position: Add 15% to rate (if position is available).

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Inside front/ inside back covers: \$3,740 for 1-2 issues; \$3,525 3-5 issues; \$3,380 all 6.

Back cover: \$3,975 for 1-2 issues; \$3,735 3-5 issues; \$3,600 all 6 issues.

Ghingo Named Hormel President

Hormel Foods appointed John Ghingo as its new president. Former CEO Jeff Ettinger will serve as the interim chief executive until a new one is named in 2026.

AFIA Restructures to Advance Industry Leadership, Grow Member Engagement

The American Feed Industry Association is embarking on an organizational realignment that will enhance the impact, operational efficiency and stakeholder engagement of the association. Given the evolving needs of its 650 feed and pet food industry members, along with projected growth within the organization's many educational programs, networking events and requests for expert analysis, the restructuring is aimed at enhancing how it serves members and stakeholders.

"One of AFIA's greatest strengths over its century-long history is its ability to remain nimble and responsive as the feed and pet food industries' needs evolve," said Constance Cullman, AFIA president and CEO. "Today, we are embarking on an organizational realignment from a position of strength — firmly grounded in our ... promises to members and focused on where we see the greatest opportunities for growth in our services, products, events and policy impact."

The realignment will create three AFIA departments for policy, member experience and operations, and strengthen the Institute for Feed Education and Research's (IFEEDER) ability to advance animal food industry research and education needs. The AFIA policy department will focus staff expertise on proactively addressing regulatory, legislative and global policy issues and enhancing AFIA's advocacy functions. The member experience department will enhance member value by ensuring

brand and messaging consistency across all association events, communications and educational programming, creating a cohesive experience that connects directly to AFIA's policy work and emerging issues impacting the industry.

The operations department will enhance the association's internal processes and administrative tasks, align revenue generation with financial planning and create opportunities to support member growth, engagement and retention.

With these changes comes the promotion of two AFIA staff members, Leah Wilkinson and Victoria Broehm. Wilkinson, who has been with the association since 2010, will lead the policy department, assuming the title of chief policy officer. Broehm, who has been with the association since 2017, has been promoted to vice president of member experience and will head the member experience department. Sarah Novak, chief operating officer who has been with the association since 2007, will lead the operations department.

On May 22, the AFIA board of directors approved Andy Timmins, association treasurer and chief financial officer, along with Wilkinson, Broehm, Novak, and Cullman as AFIA staff officers. Lara Moody, IFEEDER's executive director since 2021, will remain in this position and serve on the leadership team.

In the coming months, the association

will post three positions for an education manager, policy engagement manager and communications director. Given IFEEDER's growing role as a content generator for reliable, trusted research and analysis on the animal food industry, the institute will add a second staff member — a senior manager of research.

More AFIA Staff Announcements

Gregory Conner has joined AFIA as senior manager of multilateral affairs and market access. In this position, he will play a key role in advancing the association's global market access, trade policy and regulatory initiatives, along with communicating to policymakers about these initiatives, representing the AFIA in trade discussions and advocating for science-based regulations to reduce nontariff barriers.

Mallory Gaines has been promoted to director of global affairs and Ivy Torres to manager of global programs. Gaines has been with AFIA since 2019. In this new role, Gaines serves as the staff lead for AFIA's global affairs committee and works to expand demand for U.S. animal food products both domestically and abroad. Torres has been with AFIA since 2023 as global programs specialist.

R

Gregory Conner



Mallory Gaines



Ivy Torres



The NARA logo is composed of the letters 'NARA' in a bold, blue, sans-serif font. A green recycling symbol, consisting of three arrows forming a triangle, is positioned behind the letters. The entire logo is set against a background of interlocking puzzle pieces in shades of green and blue.

NARA

There's a Place for you in

If your business involves rendering – from processing animal by-products to supplying those businesses with goods and services or utilizing rendered products – there is a place for you in the membership of the North American Renderers Association.

NARA

NARA has several different categories of U.S. and Canadian members:

ACTIVE MEMBERS:

Companies that process used cooking oil (UCO) and animal by-products into tallow, lard, grease, meat and bone meal, poultry meal, feather meal, blood meal and other products.

ASSOCIATE MEMBERS:

Business partners of renderers who provide goods and services – equipment manufacturers, transportation providers and testing labs, for example.

BIOFUELS MEMBERS:

Companies that further refine rendered fats and oils into renewable fuels.

ALLIED MEMBERS:

Business partners who buy or broker finished rendered products, including traders and pet food or livestock feed producers.

INTERNATIONAL:

Each membership class also has an international counterpart for global companies who have shared interests with the U.S. and Canadian rendering industry.

Visit us at nara.org to learn more and find an application in the membership section. If you have questions, contact Marty Covert at mcovert@nara.org.

NARA has a place for you!



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AAFCO Annual Meeting

Aug. 4-6, Omaha, NE • aafco.org/events/meetings/annual/2025-annual-meeting/

NARA Quarterly Meeting

Aug. 13, virtual

September

REAM/International Rendering Conference

Sept. 2-4, Guadalajara, Mexico • renderingamerica.com

2025 Liquid Feed Symposium

Sept. 9-11, Fort Worth, TX • afia.org/events/lfs-2025

World Congress on Oils and Fats

Sept. 15-19 Rosario, Argentina • asagaworldcongress2025.com

APPI Code of Practice and FSMA Training

Sept. 16-17, Des Moines, IA • nara.org/about-us/events

Poultry Federation Nutrition Conference

Sept. 23-25, Rogers, AR • thepoultryfederation.com/events/nutrition-conference

Food and Agriculture Organization (U.N.) Global Conference on Sustainable Livestock Transformation

Sept. 29-30, Rome, Italy • fao.org/events/detail/fao-global-conference-on-sustainable-livestock-transformation/en

October

International Feed Industry Federation/FAO Annual Meeting

Oct. 1, Rome, Italy • ifif.org/global-feed/events/ifif-fao-annual-meeting-2024

FAO/IFIF Global Feed Regulators Meeting

Oct. 2-3, Rome, Italy • ifif.org/our-work/project/international-feed-regulators-meeting-ifrm/

Protein Pact Solutions Summit

Oct. 8-10, Los Angeles, CA • meatinstitute.org/Events

NARA Convention

Oct. 21-24, Amelia Island, Florida • nara.org/about-us/events

November

Equipment Manufacturers Conference

Nov. 5-7, Rancho Mirage, CA • afia.org/events/calendar/2025-equipment-manufacturers-conference

Meeting information could change so visit the listed website for updated information.

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