



The Official Publication of NARA

April 2026

Render

US Market Report

U.S. Renderers Exported a Record Amount of Protein in 2025 Amid Trade Disputes and Profitability Challenges

NARA Hosts International Rendering Symposium

**Product Innovation:
A Patented SRM
Removal System**



NOTHING LEFT BEHIND *

* **EXCEPT A
SUSTAINABLE
LOCAL FOOD
SUPPLY.**

At West Coast Reduction nothing is important to us. Because when there's nothing left — that's when we've done our job. We collect food waste and by-products from food producers, like farms, restaurants and even supermarkets, transforming them into ingredients used in animal feed, renewable energy, and thousands of other products we use every day. Our efforts contribute to a sustainable local food supply, and help us all live in cleaner and healthier communities.

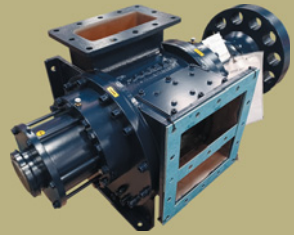
To learn more head to WCRL.COM



WEST COAST
REDUCTION LTD.



THE HAARSLEV SERVICE EXCHANGE PROGRAM







Refurbished

Always replaced

Always replaced

You receive a completely refurbished pump every time, and **never have to buy a lamella pump again** - no surprises for you or your team!

-  **MINIMIZE DOWNTIME**
Keep your operations running without unexpected interruptions.
-  **LOWER COSTS**
Fixed-price refurbishments with no budget surprises.
-  **GUARANTEED PERFORMANCE**
Refurbished by Haarslev experts, backed by a full warranty.
-  **NO EXTRA WORK FOR YOU**
We handle all refurbishing logistics.

A smarter way to keep your pumps running smoothly!

With the **Haarslev Service Exchange Program**, you replace worn lamella pumps quickly and predictably.


HOW IT WORKS


SIMPLE 4-STEP PROCESS

The hassle-free way to maintain your Lamella Pumps

- 1 CONTACT US**
Let us know when your pump needs refurbishing.
- 2 RECEIVE A "LIKE NEW" PUMP**
Shipped directly to you, fully warrantied.
- 3 SWAP & KEEP RUNNING**
Replace your worn pump during your next maintenance stop.
- 4 RETURN THE OLD PUMP**
We handle the refurbishment, so it's ready for next time.

Exclusive program pricing - contact us today!

 816-799-0808

 us-customersupport@haarslev.com

YOUR REPUTATION IS OUR MOTIVATION

Kemin is assurance for renderers. We offer industry-leading solutions and specialized expertise in food safety and oxidation control for the stabilization of protein, fats and oils, and raw materials. Assuring freshness throughout the rendering process and to delivery — *Kemin is with you every step of the way.*



Oxidation control



Food safety solutions

KEMIN[®]
Compelled by Curiosity™

kemin.com/nutrisurance

TAKE YOUR RENDERING TO THE NEXT LEVEL

Providing long-lasting customized solutions to lift your projects

HOW WE CAN HELP YOU:

- From **single machines to complete plants** of all scopes and sizes.
- **Customized** meat rendering & fish meal processing equipment to **fit the individual requirements** of all our customers.
- Our innovative solutions drive the industry standard forward.
- We guide you **every step of the way through the whole process**, from the design phase to after-sales maintenance and delivery of spare and wear parts.
- Agile production - able to plan and execute your project in reasonable time.
- **Globally present**, with local facilities and agents near your area.

LOCAL FACILITIES - WORLDWIDE PRESENCE

Reach out to us now via the contact information below



WHY CHOOSE US:

- We have provided customized **solutions** for some of the **largest players in the meat rendering industry**
- We ensure our own solutions stay up to date with **high quality standards** in the rendering industry
- We **strive for better performance** by **continuously educating** our employees



Scan the QR code to learn more about how we can help you with your next rendering project.

FIND US ON FACEBOOK,
LINKEDIN & YOUTUBE



OESTERGAARD

FEED & FOOD SOLUTIONS

OESTERGAARD Inc. • +1 (913) 754 - 8108 • sales@oestergaardus.com • oestergaardus.com



Photo courtesy of Sanimax

Features

- 8 2025 US Market Report**
U.S. renderers exported a record amount of protein in 2025 amid trade disputes and profitability challenges.
- 16 PCRA Meets to Discuss Key Legislative, Regulatory Issues**
- 22 NARA Hosts International Rendering Symposium**

Departments

- 6 View from Washington**
Litigation, Not Negotiation, Settles Score on Trump Tariffs
- 17 People of Rendering**
- 18 From the Association**
Farm Bill Legislation Update
- 26 Biofuels Bulletin**
'Livin' on a Prayer'
- 30 Membership Matters**
Rendering Is Stronger Together
- 32 APPI Update**
Embracing the Change
- 34 Labor and the Law**
OSHA Inspections and the 4th Amendment: Understanding Legal Limitations and Effective Inspection Management
- 36 Product Innovation**
A Patented SRM Removal System
- 37 Newslines**
- 37 People, Places and ...**
- 40 Mark Your Calendar**

Editorial staff

Editor and Publisher

Sharla Ishmael

Associate Editor

Ron Kotrba

Magazine Production

Raised Brow Productions

Phone: (888) 927-3634

editors@rendermagazine.com

www.rendermagazine.com

Contact the North American Renderers Association
500 Montgomery St., Ste. 310, Alexandria, VA 22314
(703) 683-0155 Fax (571) 970-2279
info@nara.org • www.nara.org

Render (ISSN 0090-8932) is published bimonthly under the auspices of the North American Renderers Association by Clear Point Communications as a public service to the North American and global rendering industry. It is intended to provide a vehicle for the exchange of ideas and information pertaining to the rendering and associated industries. *Render* is distributed free of charge to qualified individuals upon written request. Publisher reserves the right to determine qualification. Publisher reserves the right to refuse advertising for any reason. Periodical postage paid for at Benbrook, TX, and additional mailing offices.

© 2026 All rights reserved.

Printed in USA

POSTMASTER: Send address changes to
Render, 1305 Blanco Ct., Benbrook, TX 76126

Plenty of Madness to Go Around

As we finished up this issue, March Madness — the nickname for the U.S. annual college basketball tournament where the finest young men and women players compete for a national championship — was starting. I'm not much of a betting person, so I don't fill out a bracket or participate in any office pools. My office pool would consist of only two people anyway, since my husband and I both work remotely.

I do love watching the games, though. Every player on the court, no matter what team they play for, gives everything their heart and body can offer. I often wish both teams could win by the time it gets down to the Final Four, because it matters so much to these athletes who have worked so hard, year-round, since they were little dribblers.

And my heart goes out to the parents watching helplessly in the stands who have cheered on their sons and daughters (at no small cost) for at least a decade. But in the end, only one team cuts down the net to celebrate a championship.

What does this have to do with the world of rendering? Not much except the drama of March Madness reminds me a little bit of our U.S. Market Report for 2025. It was a roller coaster of a year for many in the business. First, we had tariffs against our trading partners, and then we didn't. And then we did again. Throw in some geopolitical tension, nontariff trade barriers and a depressed biofuels sector. But then the ride went up again with changing renewable fuels regulations that gave both biofuel producers and renderers something to cheer about.

In the background, NARA's members exported a record amount of animal

protein — double what they exported just 10 years ago. Despite the chaos, by the end of the year, fat prices were up a bit, production remained stable and renderers had some big wins in the regulatory space.

Now, primary elections are in full swing across the U.S., and madness of another kind takes hold. Speaking of politics, NARA needs your face in D.C.

for the annual Congressional Fly-In. Go meet your representatives and advocate for the industry in person — it makes a real difference. Registration information can be found on page 20. Don't wait, sign up today!

Sharla Ishmael
Editor/Publisher

R

Reach more customers...



By advertising in *Render!*

Render is the only print publication to serve the international rendering industry. If your company is selling products or services targeting this market, you need to get in front of our readers.

Contact *Render* at (888) 927-3634
e-mail: editors@rendermagazine.com
www.rendermagazine.com/advertising



300-GALLON GREASE CONTAINER

- A standard in the industry since 1983
- Manufactured from rugged 12-gauge steel
- Comes standard with heavy-duty poly lid, screen and dump pins
- Other lid options available for security

For more information, visit onkens.net or call (309) 562-7271.



Litigation, Not Negotiation, Settles Score on Trump Tariffs

President Donald Trump's best-laid trade policy plans were shredded by a 6-3 U.S. Supreme Court decision Feb. 20, which overturned the president's use of the International Emergency Economic Powers Act to impose tariffs on countries worldwide. Those so-called reciprocal tariffs have been eliminated. Announced almost immediately, however, is a 10% tariff in their place that the president levied using an entirely different legal authority known as Section 122 tariffs.

This backup plan saves face, but its use will be short-lived as the administration sorts through a legal pileup of companies seeking refunds for the now-illegal tariffs. The issue of refunds is currently a legal fight as U.S. Customs and Border Protection determines how to process refunds of some \$166 billion in tariffs collected from 330,000 importers covered by the ruling.

In multiple rulings, the U.S. Court of International Trade — which originally overturned the tariffs last year, prompting the appeal to the Supreme Court — has ordered immediate refunds of the revenues collected under the tariffs. Drawing pushback from customs, the government argued that refunds of this magnitude are unprecedented and, therefore, require more time.

In a ruling issued in the first week of March, CIT Judge Mark Eaton admonished the administration that the clock on refunds is ticking. "Further interest is accumulating every day, with approximately \$650 million accruing per month," Eaton wrote in his order to the Trump administration. "If the entries are not liquidated before the end of the year, it is further estimated that \$10 billion of interest will have accrued."

CBP estimates that more than 50 million importing entities that paid the invalidated tariffs may be entitled to refunds. More than 2,000 companies have filed suit seeking refunds, following legal counsel in many corners advising individual companies to file suit to stake their own claim. Eaton believes a more expeditious process is in order but has granted customs 45 days after the agency argued that the sheer volume of claims cannot be properly processed without developing an automated system. Customs told the court the system could be operating by April 20.

Meanwhile, key trading partners, including China and the EU, are taking a moment to reevaluate trade policy talks with the Trump administration. Initial agreements between the U.S. and its two largest trading partners are in place. Trump and Xi Jinping, president of the People's Republic of China, will meet in May to assess the agreement reached in December and discuss further efforts to lower the temperature on tariff retaliation.

The European Parliament has frozen a U.S. agreement reached in July. Following Trump's threatened takeover of Greenland, and now after the Supreme Court defeat, EU lawmakers have voted to put the agreement on ice pending more information from the Trump administration.

Tariffs aren't going away anytime soon as the administration looks to employ other trade authorities for negotiating leverage. For now, some tariff relief is on its way — compliments of the Supreme Court. **R**

"Indispensable"

The Dupps Customer Toolbox™ has all the tools, all the time.

A game-changer for every renderer, the Dupps Customer Toolbox— a secure, on-line client portal — provides instant access to all the resources and information vital to your rendering operation.

Power your process

The **Dupps Vault** has all the service records, maintenance manuals, procedures and service schedules for the equipment in your plant, at your fingertips 24/7/365. Plus —

- Comprehensive troubleshooting tools.
- A full library of rendering information and videos.
- An interactive chatbot and 'Ask Okey' avatar are always on duty to answer any question.

Power your people

The **Dupps University** trains and educates on everything rendering. So new hires hit the ground running. Seasoned employees learn new concepts. And everyone on your team becomes a rendering authority.

- In-depth, on-demand E-learning classes.
- Customized training at your plant or at Dupps.
- Exclusive webinars with the most experienced experts in the business.

Open up your Toolbox today
dupps.com/toolbox.html

The Dupps Company • Germantown, Ohio • U.S.A.

DUPPS™



2025 US Market Report

Photo courtesy of Sanimax

U.S. renderers exported a record amount of protein in 2025 amid trade disputes and profitability challenges.

By Dana Johnson Downing, NARA Senior Vice President of International Programs

The global market for rendered products continued to shift in 2025 as renewable fuel demand, evolving livestock production cycles and expanding aquaculture reshaped traditional supply and demand patterns. Despite those changes — and a trading environment that occasionally tested exporters’ patience — the U.S. rendering industry delivered another year of stable production and record animal protein exports.

Even with these shifting dynamics in 2025, the U.S. rendering industry once again demonstrated its resilience. Production levels remained stable even as cattle supplies tightened, while export markets absorbed a record volume of rendered animal proteins. At the same time, domestic demand for low-carbon feedstocks continued to reshape markets for fats and oils, sending significant volumes into renewable fuel production.

Yet global markets rarely move on supply and demand alone. Exporters operate in a complex trading environment where regulatory systems, bureaucracy and policy decisions can influence the movement of goods as much as market fundamentals. Navigating these dynamics requires sustained engagement with customers, regulators and policymakers in key markets around the world.

In a year when geopolitical tensions and trade negotiation brinkmanship dominated the headlines, we were fortunate

to see global demand fundamentals for rendered products remain strong. Growth in aquaculture and livestock production continues to support the use of rendered proteins in feed rations, and sustainability considerations are drawing new attention to rendering’s role as one of agriculture’s most circular industries.

In a world increasingly focused on sustainability and resource efficiency, rendering shines because few, if any, industries boast greater circularity than upcycling animal by-products and used cooking oil.

These broader trends set the stage for a year that delivered both challenges and opportunities for the U.S. rendering sector.

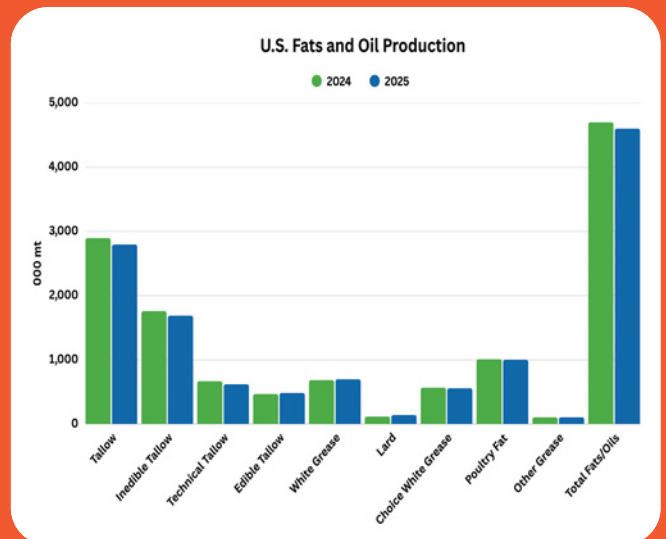
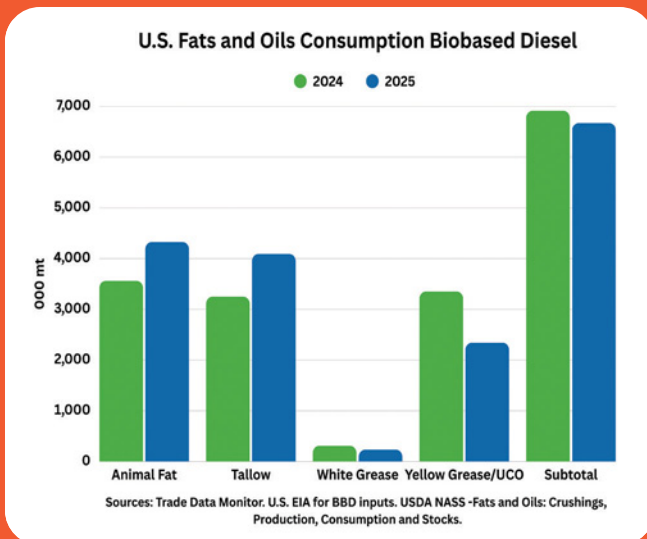
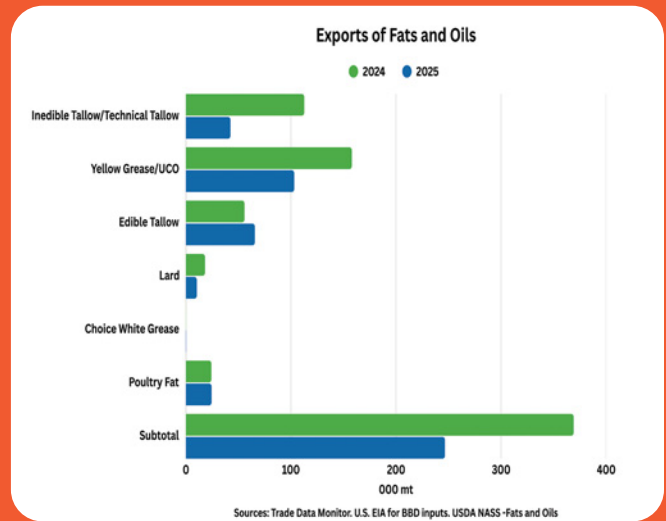
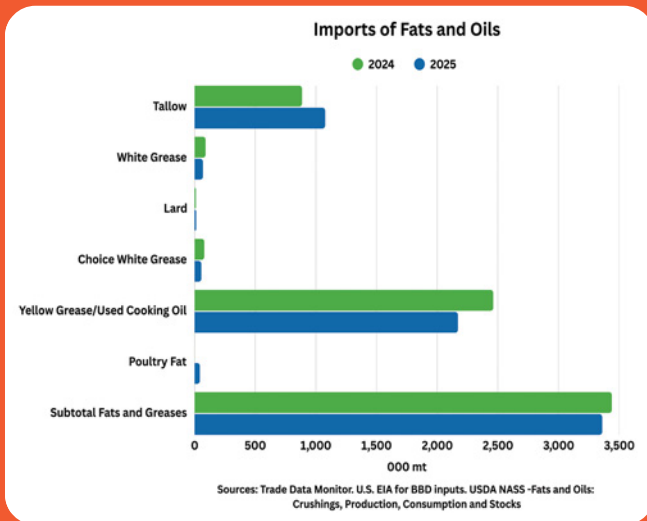
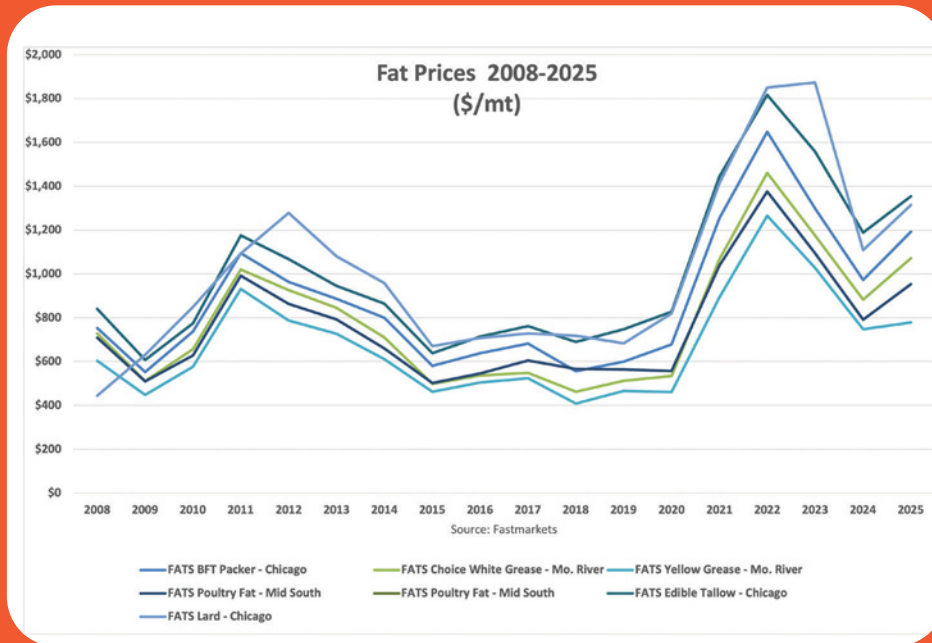
Production Remains Steady Despite Livestock Cycle

U.S. rendering production remained relatively stable in 2025 despite shifts in livestock inventories and evolving market dynamics. Total production of rendered products reached approximately 9.26 million metric tons (mmt), down slightly from 9.35 mmt in 2024.

Rendered protein meal production held steady at roughly 4.66 mmt, while fats and grease production declined modestly to about 4.6 mmt.

Continued on page 10

The Skinny on Fats and Oils



These stable production levels came during a period when cattle supplies continued to tighten. U.S. cattle slaughter declined year-over-year, reflecting the ongoing contraction phase of the cattle cycle that has reduced herd inventories over several years. Rising carcass weights, however, helped offset some of the impact of lower slaughter numbers. Heavier animals kept overall beef production comparatively resilient, even as cattle numbers declined.

Industry analysts widely expect the U.S. cattle sector to reach the turning point of its current cycle in 2026, when herd rebuilding may begin after several years of liquidation driven by drought and high input costs. Expansion is expected to proceed gradually, meaning tight cattle supplies could persist for several years before larger calf crops begin entering feedlots later in the decade.

Record Animal Protein Exports

Export markets once again played a critical role in balancing U.S. supply. In 2025, exports of animal protein meals reached a record 1.17 mmt, surpassing the previous record set just one year earlier.

Vietnam emerged as the largest destination for U.S. animal protein meals, with shipments exceeding 345,000 metric tons (mt). The rapid expansion of Vietnam's aquaculture sector continues to drive strong demand for high-quality feed ingredients.

Indonesia remained the second-largest market despite temporary disruptions affecting plant eligibility listings in the final quarter of the year. China, Mexico and Ecuador also remained important destinations for U.S. rendered proteins.

The continued growth of aquaculture production is one of the most important structural drivers behind global protein demand. Long before aquaculture became widely recognized as a major investment opportunity in global food production, the rendering industry was already supplying high-performance feed ingredients that helped support the sector's development.

Feather Meal Exports Decline

One notable exception to the broader export growth trend was feather meal. Feather meal exports declined sharply in 2025, reflecting several factors affecting global protein markets. Demand for feather meal tends to strengthen when prices for other protein meals are elevated. In 2025, however, broader protein prices softened, reducing the incentive for feed formulators to incorporate feather meal into rations.

Market access challenges also played a role. Temporary disruptions affecting plant eligibility listings in Indonesia limited shipments to one of the product's key markets, while competitively priced supplies from Brazil likely displaced some U.S. exports in South American markets.

Integrated poultry producers also appear to be utilizing a greater share of feather meal internally when export margins narrow. Because feather meal originates directly from poultry processing, vertically integrated companies can redirect production into domestic feed rations relatively easily when international demand softens.

Diverging Price Signals

Price trends for rendered products in 2025 reflected the increasingly complex mix of factors shaping global markets for animal proteins and fats. While most rendered protein meals

traded below prior-year levels due to softer soybean meal prices and increased competition across feed protein markets, prices for many rendered fats strengthened during the year as domestic demand for low-carbon feedstocks continued to influence market dynamics.

Chloe Krimmel, senior market reporter at Fastmarkets, noted that expanded U.S. soybean crush capacity and evolving biofuel policies increasingly influence soybean meal pricing, often independently of traditional feed protein fundamentals.

At the same time, markets for rendered fats and oils were influenced by expectations surrounding evolving renewable fuel policies and feedstock demand. Sarah Schneider, feedstock analyst with Fastmarkets, pointed out that shifting expectations around the upcoming 45Z clean fuel production credit and Renewable Fuel Standard obligations helped shape price movements in animal fats during the year.

Navigating Trade Friction, Shakedowns

International trade rarely unfolds without friction, and seasoned exporters understand that the official explanation for new policies or inspection protocols is not always the whole story.

From sudden testing requirements to administrative "glitches" that temporarily remove approved facilities from import systems, exporters occasionally encounter disruptions that seem to appear — and resolve — with curious timing. Then there are blatant attempts to raise revenue at the expense of commodity traders by imposing a value-added tax only on imported products, which amounts to a de facto tariff. Regulations may be written in black and white, but their application often occurs in shades of gray.

In some cases, measures presented as technical safeguards function more like commercial barriers, shifting negotiating leverage or creating opportunities for intermediaries to insert themselves into the transaction.

Maintaining stability in these markets requires a consistent industry presence — supporting facility registrations, working with regulators to clarify technical standards and bringing buyers and government officials to the U.S. to see the rendering system firsthand.

The reality is that markets do not maintain themselves. Keeping them open necessitates persistent engagement, technical credibility and a willingness to address problems before they become trade disruptions.

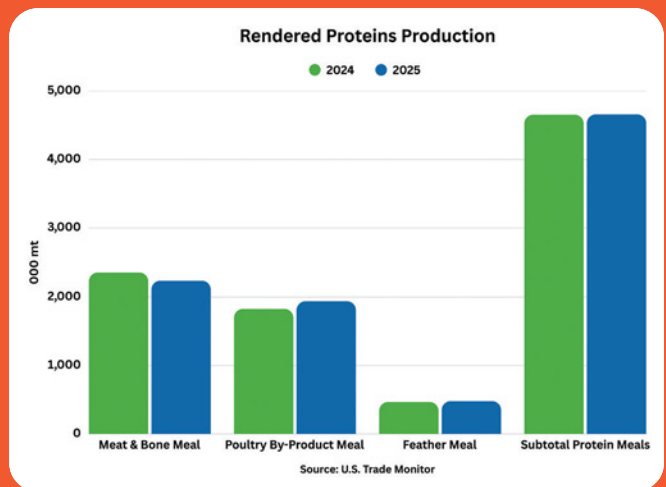
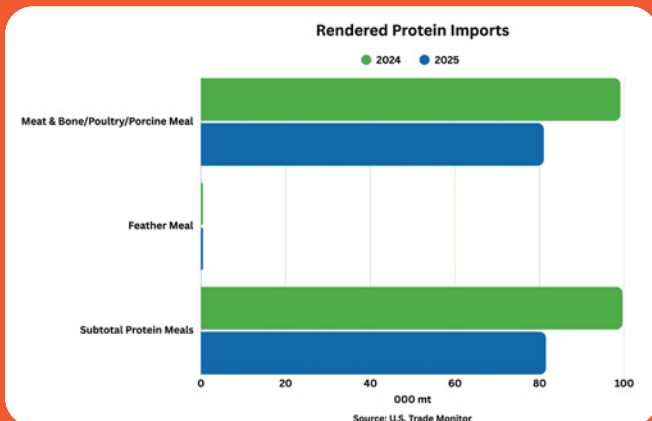
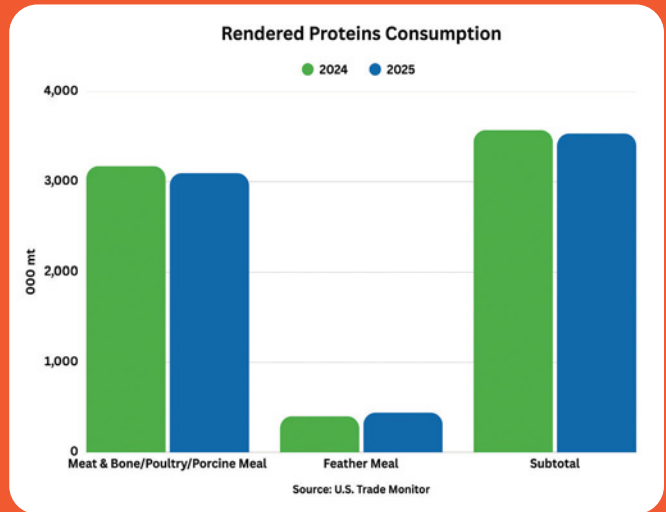
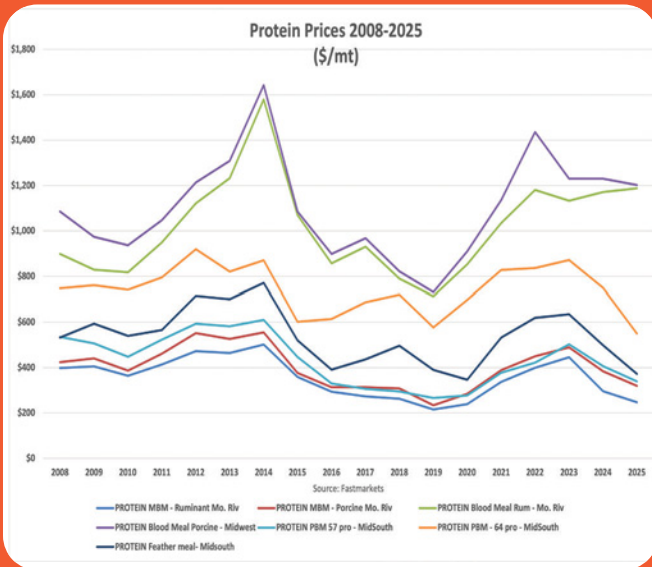
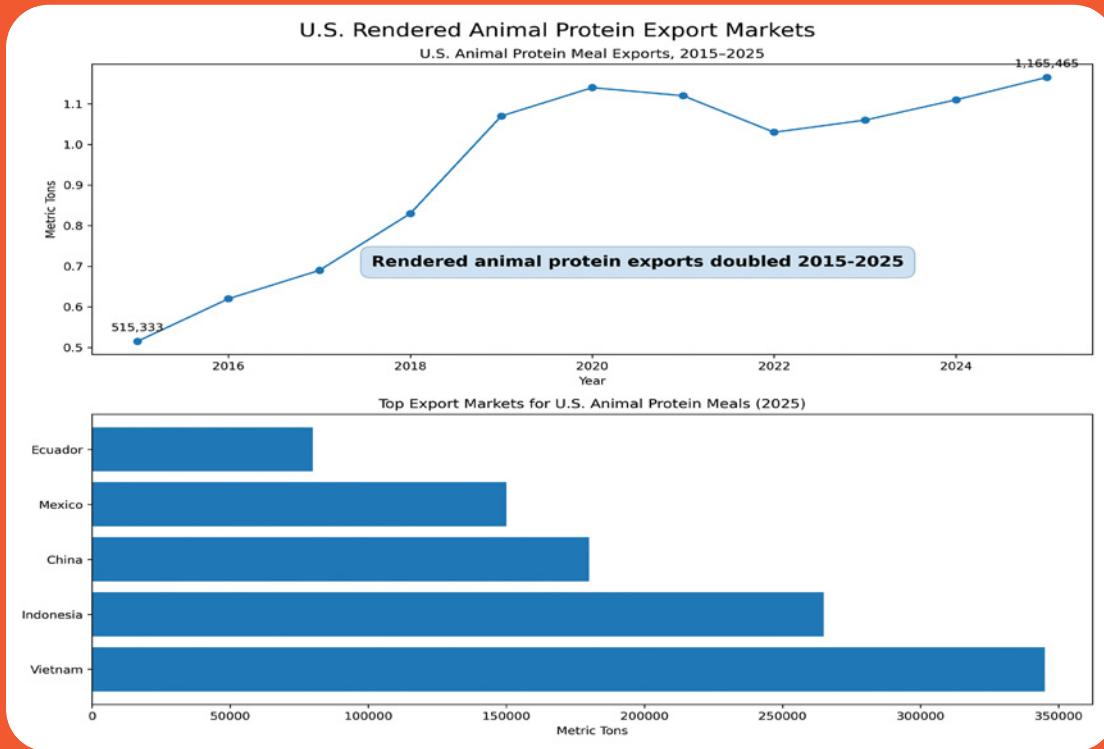
Veteran exporters know that when a problem appears overnight, it often means someone has been working on it for quite a while.

Rendering's Circular Advantage

For much of its history, the rendering industry has operated largely out of the public spotlight. Rendered ingredients have long served as essential inputs for animal feed, aquaculture diets and pet food formulations. As sustainability reporting and carbon accounting become increasingly important across food supply chains, the rendering industry has recognized the need to step into the spotlight to provide our downstream customers with data to support their sourcing decisions and carbon accounting initiatives.

Continued on page 12

The Protein Story



In 2025, the rendering industry embraced participation in a U.S. industrywide life-cycle analysis (LCA) initiative designed to establish a baseline for sustainability data that feed nutritionists rely on when formulating diets for both performance and carbon intensity. Companies across the industry invested significant effort in collecting operational data that will ultimately be incorporated into the Global Feed LCA Institute (GFLI) database.

These efforts are expected to highlight several advantages of U.S. rendering systems. Investments in modern processing equipment, improvements in plant efficiency and the availability of a highly efficient rail transportation network are all factors likely to contribute to a strong environmental performance profile for U.S. rendered products.

When the LCA is finalized in 2026, the industry will have current, science-based data to demonstrate the circular and low-carbon advantages of U.S. rendered ingredients compared to other feedstocks.

More Money, More Markets?

As the industry looks ahead, expanded resources for market development may create new opportunities to grow exports of rendered products.

In addition to the \$6.3 million in additional Regional Agricultural Promotion Program funding that NARA received from the U.S. Department of Agriculture during 2024 and 2025, a new initiative — the America First Trade Promotion Program — was created in 2025 that will double the market development funding available to U.S. agricultural export groups.

The expanded resources come at a time when the federal agencies responsible for supporting agricultural trade are undergoing structural changes. USDA is in the midst of a

broader reorganization that may move several agencies outside the Washington, D.C., region. At the same time, the U.S. Animal and Plant Health Inspection Service has faced staffing challenges that directly affect export certification and market access negotiations.

APHIS began 2025 with roughly a 10% shortfall in veterinarians and technical staff responsible for inspecting rendering facilities, issuing export certificates and supporting trade negotiations. One year later, staffing levels remain below historical levels, complicating efforts to expand market access even as new funding becomes available to promote U.S. agricultural exports.

NARA continues to advocate for policies that support recruiting and retaining APHIS veterinarians, including workplace

Table 3. U.S. Annual Livestock and Poultry Slaughter, 2014-2025

Specie/Unit	2014	2015
Cattle - thousand head	30,266	28,843
Hogs - thousand head	106,958	115,512
Broilers & Mature Chickens - thousand head	8,669,628	8,822,692
Turkeys - thousand head	236,617	232,389
Ducks - thousand head	26,368	27,749
Source: USDA/National Agriculture Statistics Service		
Specie/Unit	2014	2015
Cattle - liveweight	1,330	1,360
Hogs - liveweight	285	283
Broilers & Mature Chickens - liveweight	6.00	6.12
Turkeys - liveweight	30.39	30.19
Ducks - liveweight	6.87	6.85
Source: USDA/National Agriculture Statistics Service		
	Livestock Slaughter Monthly	
	Livestock Slaughter Annual Summary	
	Poultry Slaughter Annual Summary	

Average Annual Prices of Select Rendered Products

		2008	2009	2010	2011	2012	2013	2014	2015
FATS	BFT Packer - Chicago	\$753	\$553	\$737	\$1,095	\$963	\$887	\$801	\$581
	Choice White Grease - Mo. River	\$729	\$511	\$657	\$1,020	\$926	\$846	\$711	\$498
	Yellow Grease - Mo. River	\$604	\$448	\$577	\$932	\$788	\$727	\$612	\$462
	Poultry Fat - Mid South	\$709	\$510	\$628	\$992	\$864	\$793	\$660	\$502
	Edible Tallow - Chicago	\$840	\$608	\$775	\$1,176	\$1,068	\$946	\$865	\$638
	Lard - Chicago	\$445	\$631	\$849	\$1,093	\$1,279	\$1,081	\$959	\$670
		2008	2009	2010	2011	2012	2013	2014	2015
PROTEIN	MBM - Ruminant Mo. Riv	\$398	\$406	\$364	\$413	\$473	\$464	\$502	\$359
	MBM - Porcine Mo. Riv	\$424	\$441	\$387	\$462	\$552	\$527	\$556	\$377
	Blood Meal Rum - Mo. Riv	\$898	\$829	\$818	\$949	\$1,122	\$1,232	\$1,580	\$1,070
	Blood Meal Porcine - Midwest	\$1,086	\$974	\$937	\$1,047	\$1,214	\$1,308	\$1,643	\$1,086
	PBM 57 pro - MidSouth	\$536	\$507	\$448	\$524	\$594	\$582	\$610	\$447
	PBM - 64 pro - MidSouth	\$747	\$761	\$742	\$795	\$919	\$821	\$871	\$602
	Feathermeal - Midsouth	\$532	\$594	\$540	\$565	\$715	\$701	\$772	\$521

Source: Fastmarkets

flexibility measures that could help strengthen the agency's inspection and trade facilitation capacity.

Resolving market access issues and updating processing parameters in trade agreements with U.S. trading partners are among the association's top goals. At the top of the list for market access priorities is pursuing access for ruminant meat and bone meal and gel bone exports to China. With President Donald Trump and President Xi Jinping expected to meet in 2026, the timing may be right to complete work that began under the Phase 1 trade agreement.

Other priority market access objectives include expanded access for ruminant meat and bone meal in Vietnam, poultry meal to Norway and Morocco and broader acceptance of mixed-species meat and bone meal across Latin America.

Looking Ahead

Global markets for rendered products will likely continue to evolve in the years ahead as sustainability considerations, renewable energy policies and the growing need for edible protein worldwide influence demand for rendered animal proteins and fats.

For an industry built on ensuring that valuable nutrients never go to waste, the mission remains straightforward: keep markets open, keep product moving and continue demonstrating the value of one of agriculture's most circular systems.

And as experienced exporters understand, progress in global trade rarely happens overnight — but with persistence, it does indeed happen.

R

										% Change
2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	25/24
30,578	32,189	33,005	33,555	32,786	33,850	34,322	32,939	31,921	29,792	-6.7%
118,220	121,317	124,432	129,913	131,563	128,986	125,322	128,047	129,744	128,199	-1.2%
8,908,986	9,050,702	9,160,910	9,339,249	9,346,660	9,325,584	9,546,222	9,501,611	9,574,528	9,685,410	1.2%
243,255	241,680	236,860	227,660	223,003	215,663	208,225	215,992	197,994	190,973	-3.5%
27,268	26,628	27,647	27,544	22,484	24,301	26,657	28,203	24,802	24,428	-1.5%
2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	25/24
1,363	1,349	1,350	1,344	1,373	1,371	1,369	1,365	1,399	1,432	2.4%
282	282	283	285	289	288	289	287	288	285	-1.0%
6.16	6.20	6.26	6.32	6.41	6.46	6.49	6.55	6.57	6.63	0.9%
30.68	30.90	31.07	32.01	32.25	32.28	31.33	31.70	32.54	31.89	-2.0%
6.85	6.92	6.98	7.03	6.97	6.96	7.05	7.10	7.13	7.00	-1.8%

Rendered Products (\$/MT), 2008-2025										
2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	24-25
\$638	\$682	\$556	\$600	\$678	\$1,254	\$1,649	\$1,299	\$972	\$1,193	23%
\$537	\$549	\$463	\$512	\$534	\$1,066	\$1,462	\$1,176	\$883	\$1,072	21%
\$505	\$524	\$408	\$466	\$461	\$893	\$1,266	\$1,028	\$748	\$779	4%
\$546	\$605	\$566	\$564	\$558	\$1,038	\$1,376	\$1,095	\$791	\$953	20%
\$714	\$762	\$690	\$748	\$828	\$1,444	\$1,817	\$1,558	\$1,188	\$1,354	14%
\$708	\$729	\$718	\$683	\$820	\$1,413	\$1,850	\$1,874	\$1,109	\$1,314	19%
2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	24-25
\$294	\$273	\$263	\$215	\$239	\$338	\$400	\$446	\$296	\$248	-16%
\$314	\$314	\$308	\$234	\$285	\$389	\$450	\$489	\$384	\$320	-17%
\$857	\$931	\$790	\$714	\$853	\$1,035	\$1,181	\$1,133	\$1,171	\$1,188	1%
\$899	\$968	\$822	\$732	\$910	\$1,136	\$1,436	\$1,230	\$1,230	\$1,202	-2%
\$330	\$306	\$295	\$266	\$277	\$377	\$422	\$503	\$407	\$339	-17%
\$614	\$688	\$721	\$577	\$698	\$828	\$837	\$872	\$750	\$550	-27%
\$391	\$437	\$497	\$390	\$347	\$533	\$620	\$635	\$499	\$373	-25%

US Production, Consumption, Imports and Export of Rendered Products for 2020-2025

	2020	2021	2022	2023	2024	2025	% Change 2025/2024
Category							
Production	000 mt						
Tallow	2,601.90	2,860.80	2,834.20	2,793.10	2,895.30	2,794.40	-3.50%
Inedible Tallow	1,603.00	1,787.90	1,794.50	1,728.90	1,758.50	1,688.70	-4.00%
Technical Tallow	572.7	606.1	590.9	585.1	667.8	620.7	-7.10%
Edible Tallow	426.2	466.8	448.8	479.2	469.1	485.1	3.40%
White Grease	734.2	697.6	745.9	741	684.9	699.3	2.10%
Lard	137.6	131.7	128.5	132.4	117.3	141.3	20.50%
Choice White Grease	596.6	565.9	617.4	608.6	567.6	558	-1.70%
Yellow Grease/Used Cooking Oil	NR	NR	NR	NR	NR	NR	
Poultry Fat	1,146.50	957.1	918	1,039.60	1,010.70	1,000.60	-1.00%
Other Grease	207.2	229.2	175.6	135.2	106.9	106.7	-0.20%
Subtotal Fats and Greases	4,689.80	4,744.70	4,673.60	4,708.90	4,697.90	4,601.00	-2.10%
Meat & Bone Meal	2,475.50	2,518.80	2,509.00	2,594.20	2,358.20	2,239.10	-5.10%
Poultry By-Product Meal	1,580.30	1,515.10	1,728.40	1,827.10	1,827.10	1,939.10	6.10%
Feather Meal	553.5	452.1	491.8	491.9	468.1	480	2.50%
Subtotal Protein Meals	4,609.20	4,485.90	4,729.10	4,913.20	4,653.50	4,658.20	0.10%
TOTAL Rendered Products	9,299.00	9,230.60	9,402.80	9,622.10	9,351.40	9,259.20	-1.00%
Imports							
Tallow	243.1	333.3	554	786	885.9	1,076.80	21.50%
White Grease	23	30.3	49.6	71.5	90.9	68.9	-24.20%
Lard	5.2	7.6	14.4	16.2	10.6	13.4	26.30%
Choice White Grease	17.8	22.7	35.2	55.3	80.3	55.5	-30.80%
Yellow Grease/Used Cooking Oil	83.1	129.4	395.6	1,373.40	2,462.70	2,171.20	-11.80%
Poultry Fat	2.1	1.3	3	2.3	0.7	43.7	5901.20%
Subtotal Fats and Greases	351.4	494.3	1,002.30	2,233.20	3,440.20	3,360.70	-2.30%
Meat & Bone/Poultry/Porcine Meal	114	92.5	81.5	116.6	99.1	81	-18.20%
Feather Meal	0.1	0.2	0.4	0.2	0.5	0.5	-4.60%
Subtotal Protein Meals	114.1	92.7	81.8	116.8	99.6	81.5	-18.20%
TOTAL Rendered Products	465.5	587	1,084.10	2,350.00	3,539.80	3,442.10	-2.80%
Consumption							
Biomass-Based Diesel							
Animal Fat	NA	1,224.90	1,273.10	2,251.30	3,562.20	4,327.90	21.50%
Tallow	NA	735.4	898.8	1,904.20	3,249.90	4,093.30	26.00%
Poultry Fat	NA	139.8	73.3	76.8	NA	NA	
White Grease	NA	314	301	270.3	312.2	234.6	-24.90%
Other	NA	35.7	NA	NA	NA	NA	
Yellow Grease/Used Cooking Oil	NA	1,535.20	2,273.10	3,092.80	3,351.80	2,343.00	-30.10%
Subtotal	NA	2,760.10	3,546.20	5,344.10	6,914.00	6,670.90	-3.50%
Meat & Bone/Poultry/Porcine Meal	3,029.70	3,002.70	3,286.20	3,481.40	3,170.50	3,093.70	-2.40%
Feather Meal	511.9	389.8	394	385.4	400.1	439.5	9.90%
Subtotal	3,541.70	3,392.50	3,680.20	3,866.80	3,570.60	3,533.30	-1.00%
Exports							
Inedible Tallow/Technical Tallow	299.8	339.5	269.8	108.8	112.7	42.5	-62.30%
Yellow Grease/UCO	761.9	557.3	391.3	193.3	158	103.2	-34.70%
Edible Tallow	103	113.5	68.8	45.7	55.8	65.7	17.70%
Lard	18.1	81.3	26.7	17	18.2	10.4	-42.90%
Choice White Grease	5.9	0.1	0.2	0.1	0.2	0.3	33.10%
Poultry Fat	19	17	17	19.2	24.3	24.5	1.10%
Subtotal	1,207.60	1,108.60	773.8	384.1	369.2	246.7	-33.20%
Meat & Bone/Poultry/Porcine Meal	1,140.00	1,123.60	1,032.70	1,056.50	1,113.90	1,165.50	4.60%
Feather Meal	41.6	62.5	98.1	106.7	68.5	40.9	-40.30%
Subtotal	1,181.60	891.8	1,130.80	1,163.20	1,182.40	1,206.40	2.00%
TOTAL, All Rendered Products	2,389.20	2,000.40	1,904.60	1,547.20	1,551.70	1,453.10	-6.40%
Sources: Trade Data Monitor. US Energy Information Agency for biomass-based diesel inputs.							
USDA NASS - Fats and Oils: Oilseed Crushings, Production, Consumption and Stocks Summary							
NA = Not available; NR = Not Reported							

Table 4. U.S. Export Customers by Product (in metric tons), 2015-2025

Product/Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2025/2024
Inedible Tallow												
Mexico	227,876	145,636	126,624	136,009	130,519	122,117	97,086	50,345	39,271	24,435	27,442	12.31%
Canada	20,797	22,600	20,000	35,418	29,840	47,722	60,869	111,447	45,421	60,750	8,964	-85.24%
Guatemala	20,449	20,094	15,249	13,608	6,800	5,600	3,800	3,000	0	3,500	6,000	71.43%
Trinidad and Tobago	205	78	159	73	34	0	61	195	1,977	756	114	-84.92%
Turkey	20,898	19,249	7,200	11,260	10,750	15,699	500	0	0	0	0	
Total All Countries	343,115	283,280	324,586	326,945	301,543	299,761	339,459	269,816	108,758	112,659	42,520	-62.26%
Yellow Grease (includes UCO)												
Mexico	72,564	50,034	63,372	39,267	48,625	58,400	92,222	96,063	62,343	49,304	41,928	-14.96%
Canada	11,716	9,073	7,726	7,968	8,739	7,998	9,513	25,405	25,205	38,765	24,836	-35.93%
United Kingdom	22,025	63,044	55,477	59,469	68,580	76,665	91,006	26,023	278	12,089	11,330	-6.28%
Netherlands	43,022	64,041	68,929	69,718	68,667	66,120	23,666	14,698	3,019	17,933	6,988	-61.03%
Colombia	593	1,846	743	445	662	1,060	1,424	1,720	1,345	2,059	2,510	21.90%
Ecuador	48	301	554	1,388	1,410	2,060	3,495	6,488	4,931	2,972	2,499	-15.92%
China	965	1,796	1,952	2,330	2,493	3,790	3,256	3,331	2,184	2,447	2,070	-15.41%
Chile	6	62	166	401	176	299	162	1,175	2,070	2,892	1,838	-36.45%
India	278	49	81	112	196	64	1,075	2,218	170	226	1,519	572.12%
Dominican Republic	9,585	10,639	9,652	7,943	7,215	9,908	11,309	9,833	4,370	1,731	1,382	-20.16%
Japan	48	63	139	260	270	296	208	631	873	874	769	-12.01%
Singapore	1,755	1,541	8,110	71,747	169,584	511,056	298,723	178,214	78,384	18,444	570	-96.91%
Total All Countries	252,959	286,226	300,198	360,682	439,045	761,856	557,270	391,256	193,299	158,002	103,242	-34.66%
Edible Tallow												
Mexico	61,076	114,154	72,120	113,525	118,951	101,587	108,783	64,127	43,177	53,998	61,052	13.06%
Canada	3,657	5,706	5,552	4,338	2,547	881	1,344	3,208	1,505	1,314	4,168	217.20%
China	0	-	-	-	-	15	-	616	1,001	387	387	0.00%
Guatemala	0	-	-	1	-	-	1,500	-	3	9	38	322.22%
Total All Countries	64,762	120,146	77,678	117,903	121,605	102,963	113,522	68,761	45,735	55,797	65,693	17.74%
Lard												
Mexico	17,691	16,924	15,876	16,173	22,097	17,515	80,631	26,469	16,496	18,096	9,825	-45.71%
Canada	393	988	605	264	259	191	205	102	3	82	549	569.51%
Marshall Islands	53	178	153	118	55	12	54	33	59	1	45	4400.00%
Total All Countries	19,768	19,050	17,181	16,825	22,488	18,097	81,293	26,730	16,957	18,234	10,420	-42.85%
Choice White Grease												
Mexico	33	208	27	67	659	295	573	22	12	37	107	189.19%
Total All Countries	491	639	202	374	797	421	661	5,909	111	224	107	-52.23%
Poultry Fat												
Canada	11,065	13,072	10,943	9,320	10,125	8,815	7,074	6,526	5,526	5,418	6,477	19.55%
Guatemala	370	458	446	516	567	561	1,003	2,659	3,773	3,600	4,957	37.69%
Mexico	854	1,731	2,418	2,139	2,545	1,955	1,780	2,153	1,718	1,461	3,048	108.62%
Dominican Republic	644	577	616	671	443	403	586	646	548	1,068	1,232	15.36%
Indonesia	-	-	-	-	-	-	-	-	-	120	1,171	875.83%
Total All Countries	14,895	18,173	16,376	14,728	16,065	14,835	12,862	18,980	16,988	17,045	19,174	12.49%
Animal Protein Meals												
Vietnam	8,214	28,416	39,528	65,629	115,544	190,485	124,192	125,900	148,347	258,036	345,304	33.82%
Indonesia	199,067	277,859	303,588	321,452	385,010	333,233	335,414	331,401	286,856	275,536	266,297	-3.35%
China	35,445	52,899	46,315	52,071	143,180	186,598	148,458	139,554	245,592	208,194	180,485	-13.31%
Mexico	103,789	99,618	129,371	197,099	197,636	200,824	254,696	151,972	155,861	138,682	148,086	6.78%
Ecuador	6,496	9,557	8,169	16,827	28,135	27,358	42,769	49,874	56,428	56,013	80,531	43.77%
Canada	58,743	64,292	66,422	54,520	49,049	54,875	56,571	51,296	42,090	35,845	30,157	-15.87%
Philippines	10,734	9,267	6,605	23,592	38,915	64,090	71,896	96,233	48,861	39,288	24,838	-36.78%
Peru	1,019	2,410	5,564	5,809	3,762	9,151	11,072	13,460	9,369	13,349	18,929	41.80%
Honduras	3,704	10,693	4,102	8,694	7,520	12,654	31,157	17,668	26,344	29,033	16,240	-44.06%
Chile	57,084	18,144	26,963	44,454	41,801	15,451	7,737	14,440	9,101	6,136	13,677	122.90%
Guatemala	1,381	4,130	2,934	915	3,336	8,770	7,998	12,360	11,359	17,368	12,376	-28.74%
Thailand	5,166	3,493	17,137	18,273	32,180	18,854	15,385	12,025	6,819	16,621	11,283	-32.12%
Colombia	950	459	925	1,204	1,561	1,494	2,701	3,142	1,048	7,946	10,256	29.07%
Taiwan	0	198	82	0	540	464	490	6	413	2,879	2,313	-19.66%
Dominican Republic	1,352	14	18	-	0	188	-	766	1,199	2,096	1,366	-34.83%
Cambodia	-	-	5,574	2,006	1,647	673	200	-	-	-	1,105	
Costa Rica	1,176	2,603	1,564	167	108	363	869	631	647	600	602	0.33%
Malaysia	1,446	3,823	15,300	9,271	12,555	7,933	3,297	2,228	-	1,000	395	-60.50%
Total All Countries	515,333	619,682	691,151	831,680	1,070,657	1,139,993	1,123,553	1,032,656	1,056,491	1,113,930	1,165,465	4.63%
Feather Meal												
Indonesia	41,750	27,373	29,177	28,058	28,047	41,604	62,488	98,105	106,661	68,519	40,913	-40.29%
Chile	24,403	10,046	11,744	30,289	43,443	23,049	23,272	37,692	47,893	53,984	33,613	-37.74%
Vietnam	2,637	1,440	-	3,925	3,763	11,124	26,691	45,839	91,952	44,983	22,538	-49.90%
China	977	7,391	18,904	30,813	4,073	1,541	-	1,029	3,034	6,329	6,523	3.07%
Ecuador	300	0	-	-	514	-	351	71	625	669	2,036	204.33%
Thailand	9	29	69	0	-	-	-	-	1,382	978	1,584	61.96%
Honduras	0	0	0	0	1,525	1,945	966	656	2,917	1,686	646	
Total All Countries	87,000	63,580	80,123	109,902	90,454	90,075	126,738	191,719	259,831	181,339	108,487	-40.17%

Source: Trade Data Monitor

PCRA Meets to Discuss Key Legislative, Regulatory Issues

By Sharla Ishmael

Members of the Pacific Coast Renderers Association met in late February in Laguna Niguel, California, to hear speakers address the current California political landscape, the California Department of Food and Agriculture's incident response work on highly pathogenic avian influenza (HPAI), the latest in rendering research and a market update, among other pertinent topics.

Dennis Albani of California Advocates provided an overview of legislation relevant to the rendering industry, including implementation of California Assembly Bill 411, which took effect Jan. 1 and allows on-farm composting of livestock carcasses from routine mortality or processing. Albani said the law requires strong environmental safeguards, particularly for groundwater protection, and that best management practices (BMPs) are still being developed.

"We met with a group of renderers, the CDFA and the state veterinarian program staff. It was a positive meeting with some upfront, good conversation. At that time, they were not definitive about how they would proceed with implementing AB 411. But they did commit to stakeholder involvement. They did commit to taking our materials and suggestions into account while evaluating the process. We will continue to meet with them and follow up with key regulators, which are the water boards and CalRecycle."

Looking ahead, Albani emphasized that California's upcoming elections will significantly reshape the political landscape. A new governor, along with more than 20 open legislative seats, will require extensive relationship-building.

The governor's race is the one that really matters right now," he said, noting that California's Top 2 primary system could potentially result in two Republican candidates advancing if the Democratic vote is split enough.

"The California Grain and Feed Association PAC needs funding engagement with all these elections going on," he emphasized. "We're not going to be able to select the governor with our PAC, but we do need to be in the room with the governor. Chris Zanobini, CEO of CGFA, is sponsoring a governor's forum with several other ag groups. We are also bringing in candidates and meeting with them individually. If we want them to know what the industry needs — we've got to be in the room."

HPAI in California

Dr. Matt Vahabi with the CDFA Animal Health branch provided an update on HPAI in California, emphasizing that the virus continues to circulate at low levels, particularly in wildlife. Since its introduction into California dairy cattle in August 2024, the virus has spread to more than 770 dairies. It's believed to spread primarily through poor biosecurity practices.

"For California, the key point is that the virus is still present in wildlife," Vahabi said. "Even when quarantines are lifted, that doesn't necessarily mean the state is HPAI-free."

He also outlined the department's strategy for handling outbreaks and disposal. On-site composting and landfiling are CDFA's preferred methods for disposal in infected poultry flocks.

Vahabi clarified that CDFA typically does not use rendering in those premises due to the potential for transportation risks and the state's limited rendering facilities.

"If any of the state's three active rendering facilities were to become positive and need to be quarantined, it would severely impact business continuity for these renderers and for livestock producers," he added.

Vahabi said rendering has continued to be used for dairy mortality management during the outbreak. Typically, HPAI in dairy doesn't require animal depopulation as it does with poultry.

Research Update

Dr. Charles Starkey, NARA's vice president of scientific and regulatory affairs, updated PCRA members on several ongoing research studies that utilize rendered ingredients for new applications and are funded by the Fats and Proteins Research Foundation. FPRF has transitioned its research focus to work with the Agribusiness Center for Research and Entrepreneurship — an initiative of the South Carolina Department of Agriculture. The partnership with ACRE allows the foundation to leverage its own grants with state funding. It also brings in additional researchers to meet the research needs of the rendering, pet food, and poultry industries.

Additionally, Starkey warned about the potential loss of some products currently used as antioxidants in pet food due to regulatory oversight and the urgent need to study alternatives. He said that if these products are banned, it will increase costs for renderers' customers.

He encouraged participation in an upcoming industry survey designed to collect economic and sustainability data. "We no longer receive detailed U.S. Department of Agriculture statistics, so this data is critical for advocacy at both state and federal levels," he said.

Starkey also invited the audience to send employees to an upcoming Code of Practice training, offered by the Animal Protein Producers Industry. The session will be held May 19-20 at Tyson Foods headquarters in Springdale, Arkansas. A brand-new training session on laboratory methods will be held immediately afterwards, May 21-22. Anyone interested in attending either session can find registration information at nara.com under the calendar of events. Questions can be directed to him at cstarkey@nara.org.

Market Update

Steven Silva, president of E.B. Wakeman Co., gave a market update, noting continued shifts in both feed and fuel markets.

"I wanted to give an update on the feed market before we go into biofuels, just because we really don't talk about the feed market much anymore, even though historically it was the main outlet for most of our commodities for a long time," Silva said. "Obviously, the U.S. cattle herd is at a 75-year low, which has resulted in record-high cattle prices. That has impacted demand for feed from the cattle industry."

“We’re seeing here in the Western U.S. feedlot numbers down on average, about 30%,” he explained. “That’s what we’ve seen from our customer base — so obviously, an equitable discount or a reduction in feed demand as well from the cattle industry. At the same time, the poultry sector is gradually recovering from HPAI and we’re seeing modest improvements in feed demand for that sector. Over the last year, the amount of yellow grease going into animal feed has dropped to about 15% in the Southwest — historically small. We would say soybean oil has taken up the bulk of that demand, as well as some vegetable oil blends.”

Silva said 2025 was definitely a year of change for fats and oils due to the profound impact of changes in government regulation and subsidies, such as the 45Z tax credit. He pointed out that renewable diesel producers had experienced significantly weakened — and even negative — profit margins in 2025. Despite that, Silva said the outlook for rendered fats in 2026 was bullish due to anticipation for a large increase in the federal Renewable Volume Obligation and the growing importance of International Sustainability and Carbon Certification verification of feedstock for access to premium European markets.

What’s Going on at NARA

Kent Swisher, NARA’s president and CEO, provided an update on the association’s leadership and recent activities since the last PCRA meeting. He said one of the significant achievements in the last year was successful advocacy efforts with the U.S. Environmental Protection Agency that resulted in the agency putting rendering back in its Wasted Food Scale.

Swisher also discussed challenges in the biofuel sector, international trade disputes in Mexico and Vietnam, and NARA’s renewed efforts to combat large-scale grease theft. The association updated its estimate of annual losses from grease theft to \$300 to \$500 million.

“We have updated our numbers, and we’ve seen some arrests,” he explained. “These are multinational crime syndicates that use this money for human trafficking, drugs and other things. So, it’s gotten the FBI’s attention.”

Swisher emphasized the importance of using a data-driven, scientific approach to better communicate the industry’s relevance in sustainability and food waste solutions. NARA is currently reviewing and updating its infographics to ensure the data it shares with the public is current and accurate.

He also noted NARA is conducting a comprehensive life-cycle assessment (LCA) for 13 rendered products and partnering with the World Wildlife Fund on a global study of rendered products in aquaculture as part of its future strategy.

The Federal Picture

Tristan Daedalus, director of legislative and regulatory affairs with Baker Commodities, closed out the annual PCRA meeting as the luncheon speaker. He explained that the “Trump 2.0” administration is more focused and effective, and ultimately more consequential in how many federal agencies are governed. He said this new era creates both uncertainty and opportunities, noting the administration’s main priorities are deregulation and devolution.

“On the political landscape, right now, the Senate is 53-47 with a Republican advantage,” Daedalus explained. “The House is currently 218 Republicans to 214 Democrats, with three vacancies. In the Senate, 35 seats are up for election including 22 Republicans and 13 Democrats. There are also two special elections on top of that. The consensus map has 51 seats going



Name:
Lucas Johnson
Age: 44
Title/Role: Manager, feedstock supply
Company: HF Sinclair
Location: Dallas, Texas
Years with Company: 1
What I like about this work:
The people!

Republican, 45 going Democratic, and four toss-ups. The Senate is at least leaning Republican at this point.

“On the House side, Democrats need to flip three seats, which is the most achievable flip in the history of elections,” he added. “There’s a lot of Republican seats at risk, and the entire chamber is up for reelection. You’ve also got redistricting everywhere. The prognosticators say there are 18 seats where there’s a good shot of switching hands. Of those, 14 are Republican and four are Democrats. There is a generic congressional ballot that asks people, ‘Would you vote for a Democrat or a Republican if the election were held today?’ That is currently 4.6 points to the Democrats’ favor.”

The Supreme Court, however, is expected to issue a ruling on a section of the Voting Rights Act that could lead to redistricting in the South and significantly alter projections for some House races.

In the meantime, progress on the Farm Bill is a priority for renderers. Daedalus said that the bill includes a provision explicitly designating rendering as the waste-stream pathway for a grant program that increases domestic meat-processing capacity. That could be a huge win for the industry. He also mentioned surface transportation reauthorization and repeal of the federal excise tax as big issues to watch. Currently, the excise tax is due to expire Oct. 1, 2028.

“If Congress does nothing, they’re gridlocked, then the excise tax expires,” Daedalus said. “So, we’re already in a much better position starting out that conversation than we have been previously.”

New PCRA Leadership

During the annual business meeting, PCRA members elected a new president — Brad Fleeman of Darling Industries — and a new vice president — Jason Andreoli of Baker Commodities. Chris Zanobini will remain secretary-treasurer. Check *Render’s* calendar of events or the NARA website next spring for dates and location of the 2027 PCRA event.

R



Farm Bill Legislation Update

This month's column in *Render* typically focuses on international trade and global market developments, but with renewed activity on the Farm Bill in Congress, I thought it would be important to highlight recent progress in negotiations on the bill and several key provisions that present opportunities for the rendering industry.

As most readers are aware, the current Farm Bill, titled the Agriculture Improvement Act of 2018, expired Sept. 30, 2023. Congress has not been able to agree on a new bill because of disputes over the Supplemental Nutrition Assistance Program, farm subsidies, conservation funding and overall spending, with the three biggest fights over SNAP, crop insurance and climate funding. Congress passed three separate extensions to allow time to negotiate a new Farm Bill. The current extension ends Sept. 30.

Certain provisions of the Farm Bill were included in the "One Big Beautiful Bill Act," signed into law July 4, 2025, which is why the new bill is called a "skinny" Farm Bill. On March 6, the Farm, Food and National Security Act of 2026 was passed by the House Committee on Agriculture by a 34-17 vote, with seven Democrats voting with Republicans. This was a big win for the committee's chair, Glenn "GT" Thompson, and it demonstrated his leadership skills in managing negotiations during heated political divisions.

The proposed legislation will now advance to a vote before the full House. John Boozman, chair of the Senate Committee on Agriculture, Nutrition and Forestry, recently said he plans to introduce his own Farm Bill proposal in the coming months. If both the Senate and House pass their respective bills, lawmakers would then reconcile the differences and send a final version to the president for approval.

Between the OBBBA and the Farm, Food and National Security Act of 2026, there are several significant potential opportunities for the rendering industry. One of the biggest wins is increased funding for trade promotion programs — funding for the Market Access Program and Foreign Market Development programs has been at the current levels since 2002. Both inflation and sequestration have eroded the funding over time.

The above legislation proposes increasing MAP funding from \$200 million to \$400 million and FMD funding from \$34.5 million to \$69 million annually. The North American Renderers Association, along with other industry stakeholders, has strongly advocated for these increases. The issue is a key topic members raised with lawmakers during the 2025 NARA Fly-In on Capitol Hill. Many thanks to all NARA members who helped carry this message to their representatives.

What does this increased funding mean for renderers? It means access to new markets, opportunities to expand existing markets and additional resources to help maintain current trade relationships while addressing nontariff trade barriers.

Years ago, NARA recognized that while the expansion of our domestic biofuel industry would increase demand for fats, it could also lead to an oversupply of protein. Soybeans, for example, are roughly 20% oil and 80% meal. In many ways, they could be considered “meal seeds” rather than oilseeds. As the soybean crush expands to meet growing demand for oil used as biofuel feedstock, the supply of soybean meal is also increasing significantly.

To stay ahead of this trend, NARA strategically used MAP and FMD funding to strengthen and expand global markets for rendered protein meals. The association has also focused on positioning rendered meals as a premium alternative to fish meal — particularly in markets where fish meal supplies are limited or prices have become prohibitively high.

From helping member facilities register for export to China to opening new international markets, NARA plans to fully leverage the proposed increases in MAP and FMD funding. These efforts have already contributed to doubling U.S. exports of rendered protein meals since 2015, with record export levels reported in 2025. NARA intends to build on this momentum and continue expanding global demand for rendered products by utilizing these programs in the years ahead.

The legislation also includes provisions that directly reference rendering. Section 6304, titled “New Mobile and Expanded Meat Processing and Rendering Grants,” mentions rendering six times and establishes a grant program aimed at supporting expanded processing capacity. The program provides grants of up to \$500,000 per award to help fund mobile and expanded meat processing and rendering projects.

Rendering is also referenced in section 7503, the “Agriculture and Food Research Initiative,” which includes rendering as an eligible area for workforce training and development support. This marks the first time rendering has been specifically mentioned in a Farm Bill, reflecting the advocacy efforts of NARA and its members, along with the Russell Group on Capitol Hill.

What is next for the Farm Bill? If both chambers pass their respective bills, lawmakers will negotiate a final compromise before sending the legislation to President Donald Trump for approval. All of this must get completed before the Sept. 30 deadline. Member involvement is critical.

Please mark your calendars for the 2026 NARA Spring Meeting, which will take place April 13-15 at the Swissotel in Chicago, Illinois. To register and make hotel reservations, please use the QR code included with this column.

In addition, it is important that NARA members continue to advocate for the rendering industry on Capitol Hill. This year’s Fly-In will be June 1-3 in Washington, D.C. We hope to see you there! **R**



Use the QR code to register for the NARA Spring Meeting.



LOOKING FOR SHELF LIFE?

With Camlin Fine Sciences you have options. You’ll get the shelf life performance you need with our NaSure® and Xtendra® antioxidant solutions, a custom application system and backed by our comprehensive customer application testing.



FIND US AT 2026 PET FOOD FORUM, BOOTH 1517

Contact us to learn how we can create the tailor-made solution you want with the high quality standards you need.

<https://www.cfsintel.com/pet-food-render>

Plan Now to Attend NARA's Annual Congressional Fly-In

June 1-3, 2026

The Kimpton George Hotel
15 E St., NW
Washington DC 20001

**ALL NARA Members Are
Invited and Urged to Attend.**

This includes allied and associate
members as well as active.



Make plans to join fellow North American Renderers Association members and staff on Capitol Hill, June 1-3. The focus of this three-day event is to meet 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 supporting local communities.

The fee for the NARA 2025 Congressional Fly In is \$350. To book your hotel room at the Kimpton George Hotel, use NARA's QR code below. The reservation cut-off date is 12:00 AM on May 1. The room rate starts at \$349 plus tax.

DISCOUNT ALERT: NARA member companies only pay for the first three registrations per company! Send four or more for the price of three registrations. For more information or any questions, please email Marty Covert at co@martycovert.com or call 703-754-8740.



**Use this QR code to register today or visit
the calendar of events at nara.org.**

BROWN

INDUSTRIAL



WaBo bodies and trailers are available in aluminum, 409SS, and steel. Our complete line of rendering equipment includes bucket, container grease, vacuum, vacuum barrel, combination, deadstock, end dumps and custom units. Our success is founded on listening to our customers' needs and feedback. Please give us a call for all your equipment needs. We thank you for many years of support, and look forward to many more.

Brown Industrial, Inc.
311 W. South St • Botkins, OH 45306
937-693-3838
www.brownindustrial.com

NARA Hosts International Rendering Symposium

By Sharla Ishmael

Talks on communicating science, the sustainability of rendered ingredients for feeds and navigating risk headlined the 2026 International Rendering Symposium, held annually in January at the International Production and Processing Expo in Atlanta. The North American Renderers Association hosts the symposium to provide education on rendering to an international audience attending IPPE.

Joe Proudman, associate director for communications at the Clear Center at the University of California, Davis, kicked off the conference with a presentation on supporting animal agriculture through science and stories. Proudman emphasized that effective communication relies on storytelling, which is more memorable and emotionally resonant than data alone.

“Research from Princeton has shown that brain activity changes when a person hears a story,” he said. “Stories are memorable and interactive. This is a great medium for engagement, for making a lasting impact. Because while data is good — and at the research center, everything we do is rooted in data — it doesn’t change behaviors. Emotions do.”

Proudman also explained that studies show people now have less trust in the government, business leaders and journalists than they used to. But the studies also show that scientists and teachers lead in keeping the public’s trust. That’s a huge opportunity for agriculture and rendering.

He encouraged the audience to take responsibility for advocating for the industry through storytelling and by meeting people where they are. “If you don’t talk about it, somebody else is going to be talking about it, right? So, it’s the time for you to get your story out there.”

Rendering Information Hub

Dana Downing, NARA’s senior vice president of international programs, spoke about the association’s new resources coming online to provide basic education on rendering to potential buyers and others. She explained how the rendering industry faces product acceptance issues in foreign markets due to a lack of understanding and misinformation.

To help address that lack of industry knowledge, NARA has been developing two new digital resources — Rendering University and a Buyer’s Guide. The association last updated its Buyer’s Guide in 2009, when it was a small, printed notebook.

“We built a digital platform for international buyers and Rendering University to set the record straight about rendering. We are also going to translate it into many different languages. It’s not just a website; it’s meant to be a hub of accurate information to build trust in our products and our processes and serve as an educational resource for the global rendering industry.”

NARA’s Communication Strategy in China

Dr. Peng Li, director of NARA’s Asia office, discussed the association’s communication and market development activities in China, where NARA has recently made a concerted effort to engage with leadership and customers in the pet food and

aquaculture sectors. Li discussed the importance of NARA’s leadership attending trade missions in the country. He says it shows that NARA really cares about the Chinese market.

“Kent Swisher, NARA’s president, came to Beijing last November and was able to meet with the minister of commerce and to introduce the importance of U.S. rendered products in different sectors of downstream Chinese industries.” Li said. “Dr. Ansen Pond participated in an animal ingredient conference in China and gave presentations on how effectively salmonella is controlled in U.S. rendered products. He also did media interviews and a live stream, talking about the safety of the U.S. ingredients that had over 66,000 viewers.”

Optimizing Rendered Ingredients for Sustainability

In the sustainability portion of the program, Lara Moody with iFEEDER shared insights from several key industry reports on feed ingredients, consumption and the circularity of rations. Moody also presented findings from a newly released report revealing a critical dependence on China in the U.S. supply chain for vitamins and amino acids. China has a significant cost advantage, and a disruption in this supply chain could severely impact animal production.

“In our strategic assessment, we were looking at four amino acids and the vitamins A, D, E and B complex,” she explained. “We assessed how vulnerable the supply chain was, the potential for disruption, the impact of that disruption on animal performance and welfare, and our ability, if we had a disruption, to use a diet modification to achieve the same desired outcome.” For more detailed information, Moody says species-specific reports can be found at ifeeder.org.

Dr. Jeff Firman of Firman Consulting spoke on the use of rendered animal proteins in poultry feed. He said rendered animal products were identified as long-standing, high-quality protein sources used in feed for broilers, turkeys and, more recently, layer hens. But the inclusion of these ingredients is also very much an economic decision.

“The poultry industry is serious about money,” Firman explained. “They always want the least cost. Now, in a general sense, as you increase the number of protein ingredients, you decrease the cost, and you have a more balanced nutrition.”

He shared data that showed using meat and bone meal could generate cost savings of 2% to 5% or more compared to soybean meal, depending on relative prices and inclusion level. Combining two rendered ingredients, such as meat and bone meal with poultry by-product meal, could cut feed prices by 5% to 6% or more. He emphasized that while sufficient amino acids are necessary for growth, an excess or imbalance, especially in low-protein diets, could reduce feed intake and performance.

Dr. Yan Wang of Zhejiang University discussed the application of rendered animal protein ingredients in diet formulations for carnivorous fishes and what challenges and solutions come with that practice.

Continued on page 24



A & S THAI WORKS CO., LTD.

TRUE TURNKEY
FISHMEAL & RENDERING
PLANT SOLUTIONS

1986

EST. – NORWEGIAN ORIGIN

YOUR PLANT RUNNING IN UNDER 1 YEAR

<1

YEAR CONTRACT
TO COMMISSION

36+

COUNTRIES
SERVED

300+

PLANTS
WORLDWIDE

BUILT BY US · INSTALLED BY US · SUPPORTED BY US

Our own certified engineers handle every installation – no third-party contractors.

OUR IN-HOUSE TEAM ADVANTAGE

- **Faster - no subcontractors:** Our own engineers design, manufacture, install, and commission every plant.
- **Expert after-sales support:** Dedicated in-house technicians ensure your plant runs at peak performance long after commissioning.



Scan for More Information

Website: www.asthaiworks.co.th

Email: sales@asthaiworks.co.th

WhatsApp: +66 80 964 9595



Global Review of Animal Protein Meals in Aqua Diets

Dr. Sergio Nates, with the World Wildlife Fund, presented an intriguing overview of the state of the global aquaculture industry and the current supply of key feed ingredients like corn, soy, fish meal and animal by-products.

“Sustainability is the driving force,” he said. “We see it absolutely everywhere. And this is something I see every single day, and I also hear from everyone around us, everyone I visit — they all talk about sustainability. That’s behind everything from Ikea producing furniture to any salmon producer.”

Nates said there is more interest in reintroducing animal by-products into aqua diets from Europe and countries that had previously stopped using them during the bovine spongiform encephalopathy (BSE) crisis. In particular, there has been talk in Norway of utilizing animal by-products again in salmon feed, which would represent a huge market. While rendered ingredients are a proven commodity in aquaculture and are already used all over the world, Nates said the issue will be convincing the European public that it’s safe and okay to use animal by-products.”

Resilience and Risk

Michael Glenn and Franklin Moore of BHT ReSources talked with participants about the growing problem of used cooking oil (UCO) theft. They explained that grease theft had evolved into a

sophisticated, organized crime operation, with annual industry losses estimated between \$300 and \$500 million.

The primary driver for the increase in theft was the high demand and prices for UCO as a feedstock for renewable fuels. Their company recently assisted the FBI on a case that led to the arrest of 13 individuals across 10 states on charges of racketeering, interstate theft and money laundering. They urged the audience to know their suppliers, embrace traceability programs and report any suspicious activity.

“If you see a guy in a white box truck back behind your restaurant that usually has greasy stains on the side, he’s probably not a legitimate renderer,” Glenn said.

Richard Weeks with the Dupps Co. shared new training tools the company has recently launched, utilizing a digital platform with two components — Dupps University and Dupps Vault. He explained the vault part of the program is a secure customer portal providing plant-specific information, including equipment manuals, service reports and interactive troubleshooting tools like 3D animations and an AI-powered chatbot.

The university side of Dupps’ program focuses on the practical “how-to” of different rendering processes and was designed to complement the “what” and “why” taught in NARA’s Rendering University. The training methodology was built on the principle of making learning engaging and emotional to improve long-term memory retention, utilizing interactive modules, quizzes and multimedia content. Participants can earn different levels of certification, which Weeks said can serve as a motivational tool.

R

GEA TAKES CARE OF THE OTHER 50%.

From single machines to complete process lines, GEA offers options for processing what can't be sold at the meat counter – almost half the total weight of the animal. Ultimately helping to save ton-upon-ton of valuable resources from becoming food waste every year.

Our 2- and 3-phase decaners are rugged, corrosion-resistant and meet high standards in terms of sanitary design. 2- and 3-phase separators from GEA are used to further process fats, blood plasma and gelatin.

To learn more please scan the QR code for our new brochure.



GEA Engineering for a better world.



GEA Westfalia Separator ecoforce Decanter Series



GEA Westfalia Separator ASE 150

We Partner With a Purpose™

Our rendering partners rely on us to **maximize ingredient value** and deliver high-performance antioxidant solutions.



Contact Us Today & Learn More About Our Antioxidant Solutions:

- Oxy-Gon®
- Oxy-Gold®
- Oxy-Block®
- Oxy-Armor™

rangen.com
nutritionales@rangen.com

‘Livin’ on a Prayer’



Bon Jovi’s popular “Livin’ on a Prayer” song from the 1980s, which has enjoyed a resurgence in popularity since the new State Farm commercial spoofing it debuted during Super Bowl LX, sort of sums up the state of the U.S. biodiesel industry right now. Particularly, the song’s refrain says it all. “Woah, we’re halfway there. Woah-oh, livin’ on a prayer. Take my hand, we’ll make it I swear. Woah-oh, livin’ on a prayer.”

The nation’s biodiesel sector has indeed been “livin’ on a prayer” and enduring conditions that are “so tough,” as the song goes, for more than a year due to reasons we’ve covered in this column (seemingly exhaustively) over the past number of issues.

As of press time in early March, however, “we’re halfway there” — more actually — as policy progress in February is queuing up the biobased diesel industry for a spring revival.

The U.S. Environmental Protection Agency delivered the final 2026-2027 Renewable Fuel Standard rule to the White House Office of Management and Budget in late February — the last step before its release expected by the end of March — and, earlier in the month, the U.S. Department of the Treasury and Internal Revenue Service finally issued proposed regulations for the section 45Z clean fuel production credit.

Final RFS Rule Sent to OMB

After EPA transmitted its final RFS rule to OMB, the North American Renderers Association, National Oilseed Processors Association, the American Soybean Association and Clean Fuels Alliance America commended the agency for the development

and applauded the Trump administration for its commitment to America’s farmers, rural communities and the biofuels industry. They called the proposal released last June “the strongest, most pro-American RFS rule in the program’s history.”

In June 2025, EPA proposed setting the 2026-2027 biomass-based diesel renewable volume obligations (RVOs) at 7.12 billion renewable identification number (RIN) credits and 7.50 billion RINs, respectively. The agency projected the volume equivalent of its RIN-based biomass-based 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.

“The work that has gone into crafting this rule reflects a genuine dedication to American energy independence and agricultural opportunity, and the groups expressed gratitude for the administration’s efforts to this point,” Clean Fuels stated.

The organizations also stressed that urgency in completing the OMB review is essential. “Program participants — from the farmers who grow the crops to the processors and producers who turn them into American-made fuel — cannot make confident planting, investment and operational decisions without clear, timely volume requirements,” Clean Fuels stated. “Every day without a final rule represents unnecessary uncertainty for the farmers and rural communities this administration has worked hard to support.”

Devin Mogler, the president and CEO of NOPA, said, “The sooner this RVO rule — the strongest, most pro-U.S. farmer RVO

rule in the 20-year history of the RFS — is finalized, the sooner the positive impacts can make their way back to the farmgate.”

Kurt Kovarik, Clean Fuels’ vice president of federal affairs, added, “U.S. biodiesel, renewable diesel and sustainable aviation fuel (SAF) producers have been forced to the sidelines, waiting for policy certainty. Final RFS volumes that deliver on the strong proposal — matching the industry’s capacity, making up for gallons lost to exemptions, providing a value-added domestic market for U.S. feedstocks — would be a game changer for rural America.”

As Kovarik alluded to, the final RFS rule will not only include all-important RVOs for 2026-2027, but it is also expected to include a vital and long-awaited decision on how EPA will handle waived gallons from the RFS program through agency-granted small refinery exemptions (SREs) for 2023-2025. Biofuel and ag groups have been pushing for 100% reallocation while Big Oil companies have been pushing for zero reallocation. Reports at press time suggest 50% will be reallocated.

The rule should also bring clarity to how EPA will manage gallons waived in the future. A number of other issues, including whether imported biofuels will generate 50% of the RIN credits that domestic fuels do, are also expected to be decided upon in the final rule.

New 45Z Guidance

In early February, the treasury department and IRS issued proposed regulations for domestic clean fuel producers to determine their eligibility for and calculate the 45Z credit under changes enacted in the “big, beautiful bill.” The proposed regulations provide guidance on the determination of clean fuel production credits, emissions rates and certification and registration requirements.

The “big, beautiful bill” made several changes to 45Z, including:

- Extending the credit to Dec. 31, 2029.
- Limiting feedstocks to those grown or produced in the U.S., Mexico or Canada.
- Adding prohibited foreign-entity restrictions.
- Broadening sale attribution for fuel sold through related intermediaries.
- Eliminating the special, higher rate for SAF.
- Adding an antiabuse provision to prevent double crediting.
- Prohibiting negative emissions rates except for fuels derived from animal manure.
- Requiring feedstock-specific emissions rates for fuels derived from animal manure.
- Excluding indirect land-use changes from emissions rates.

One of the big questions for the Sustainable Advanced Biofuel Refiners Coalition was whether the proposed rule would only cover 2025 regulations or if it would also cover 2026 and beyond, since the changes made to 45Z in July 2025 when the “big, beautiful bill” was signed into law did not take effect until Jan. 1, 2026.

“So effectively there are two programs — one for 2025 and one for 2026 and beyond,” SABR stated. “The proposed regulations do indeed cover both programs: 2025 and 2026 and beyond.”

SABR CEO Joe Jobe said, “These proposed rules will provide clarity for the program and a much-needed signal to the market to

move forward.” His organization further noted that “the biodiesel markets have been nearly paralyzed for over a year by the policy uncertainty created by the lack of implementing regulations, which caused severe economic harm to farmers, biodiesel producers and all stakeholders in the biodiesel value chain.”

This harm was no better evidenced than in biodiesel production volumes from last year in Iowa, the nation’s leading biodiesel-producing state. The Iowa Renewable Fuels Association compiled production information from a confidential industry survey.

According to the IRFA-compiled data, Iowa’s biodiesel plants produced 244 million gallons in 2025, down 31% from 353 million gallons in 2024. Only eight facilities reported production in 2025, with several running off and on, well under capacity. Iowa’s biodiesel plants can manufacture over 400 million gallons annually if running at full capacity.

“2025 was a real gut punch for biodiesel everywhere and Iowa was no exception,” said IRFA Executive Director Monte Shaw. 2025 represented the last of a disappointingly low three-year RFS blend rule put in place during the Biden administration, IRFA pointed out, as well as the first year without the 20-year-old biodiesel blenders tax credit (BTC) since it expired at the end of 2024. 45Z has replaced the longstanding BTC.

“Lack of tax policy coupled with low RFS numbers sent producers into a tailspin,” Shaw added. “We have plants trying to hang on by their fingertips waiting for clarity from D.C.”

According to the IRFA data, soybean oil use in Iowa biodiesel production spiked in 2025, accounting for 92% of feedstock last year. Animal fats, used cooking oil (UCO) and corn oil each accounted for less than 5% of feedstocks.

“The delay in rulemaking led to market uncertainty that took a heavy toll on our industry, undercutting fuel production and the value added to agriculture,” Clean Fuels’ Kovarik said. “The [treasury department and IRS] responded to many taxpayer concerns and resolved some uncertainties from the guidance issued a year ago. We anticipate this proposal will provide additional market certainty for biodiesel and renewable diesel producers.”

Clean Fuels pointed out that the proposed rules also provide taxpayers with safe harbors and clarify questions on qualified sales, tolling arrangements and qualifying fuels used in nontransportation applications raised after the January 2025 guidance.

Grant Kimberley, executive director of the Iowa Biodiesel Board, said the move is a positive step in restoring the health of the biodiesel industry.

“Although the credit has been available since January 2025, the minimal guidance made it virtually impossible for producers and farmers to capitalize on it,” he said. “The proposal responds to taxpayer comments on prior guidance and provides much-needed additional certainty for the industry as the formal rulemaking process moves forward.”

A public hearing on the proposed 45Z regulations is scheduled for May 28.

I won’t ask you to “take my hand,” as the song goes, because that would just be weird, but “we’ll make it, I swear.” If I were a betting man, which I am, I would wager that, by the next issue of *Render*, the RFS final rule will be out and the U.S. biodiesel industry will be rockin’ and rollin’ again. We’ve just got to “hold on, ready or not. You live for the fight when that’s all that you’ve got.” **R**

Biodiesel | Renewable Diesel | SAF | Marine Biofuel

News Information Perspective

- Free Daily Content
- Free Weekly Newsletter
- Free Print Publication

Sign up for free by filling out the short contact form in website footer

Focused | Experienced | Trusted

Biobased Diesel Daily®

biobased-diesel.com

218-745-8347 | editor@biobased-diesel.com

**Your company
could be here in front of
3,000 rendering industry
decision makers.
Let's fix that for
the next issue.**

www.rendermagazine.com/advertising

RoseDowns

A BUILDING ON
A LEGACY

PRECISION PARTS EXPERT SERVICE COMPLETE SOLUTIONS



**SERVICE
CENTER**

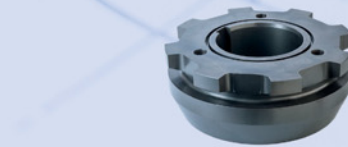
RoseDowns Service Center provides full-service support to the North American rendering industry, from pick-up to strip, rebuild, and delivery of shafts, cages, and choke assemblies for all screw press models.

With a comprehensive inventory of RoseDowns parts manufactured in the UK and Germany, we ensure rapid turnaround and minimal downtime.

Our advanced materials and precision-engineered designs deliver durable, cost-effective wear parts compatible with both RoseDowns and competitor presses.

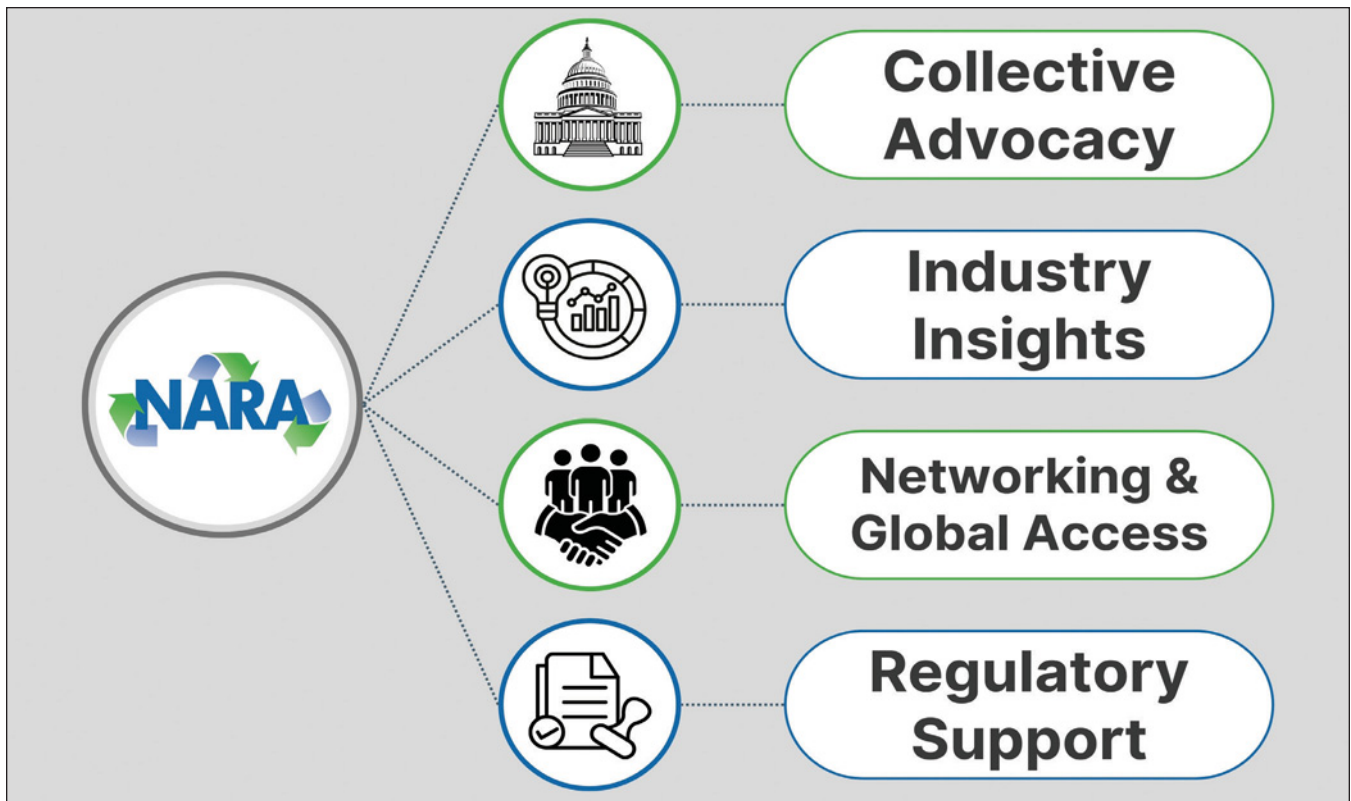
From maintenance to custom engineering, we offer end-to-end solutions that optimize press performance and reliability.

Whatever press you operate, RoseDowns keeps it running at its best.



1123 Swift - North Kansas City, MO 64116
833-922-2447 Toll Free
816-406-3156 Office
Ken.dozier@desmet.com
rosedowns.co.uk

RoseDowns is a proud part of the global Desmet organization



Rendering Is Stronger Together

Why membership is a business strategy.

After six years working in the rendering industry and now serving on the association side, I see the value of the North American Renderers Association more clearly than ever. It is more than an affiliation — it is a strategic advantage.

I remember being interviewed six years ago by Tina Caparella, the former editor of *Render*, and being featured in the June 2020 issue in the article, “Next Generation: Assuring a Bright Future for Rendering.” At the time, I had only been out of college for a couple of years and was still new to the industry. I attended my first International Rendering Symposium that year and met fellow NARA members, forming connections that would shape my career.

Some people I met that day later became colleagues and are now friends. While those relationships are invaluable, the benefits of NARA membership extend well beyond networking.

In today’s operating environment, rendering companies face a complex mix of regulatory pressure, market volatility, workforce challenges and global trade uncertainty. Success depends not only on operational excellence inside the plant but also on strong representation outside of it. That is why membership in NARA is a business strategy.

Decisions are made every day in Washington, state capitals and international markets that directly impact renderers’ ability to operate, transport materials, access export markets and compete in feed ingredient, pet food and renewable fuel sectors. NARA serves as a unified voice, representing the best interests of its members in public policy, government and regulatory affairs.

Advocacy is one of the clearest examples of NARA membership delivering measurable value. Whether engaging with the Food and Drug Administration and the U.S. Department of Agriculture on feed safety policies, working with the U.S. Environmental Protection Agency on the federal Renewable Fuel Standard, achieving significant wins like restoring rendering to the Wasted Food Scale, addressing transportation regulations or protecting export access for rendered products, NARA ensures our industry has a seat at the table.

That representation safeguards market opportunities and reduces regulatory risk — both of which directly affect the bottom line.

Membership also strengthens business intelligence. Through committees, meetings and shared updates, members gain insight into emerging regulatory proposals, trade developments and market trends before they fully materialize. In an industry where margins and market access can shift quickly, timely information is a competitive advantage.

In uncertain times, resilience is built through partnership. NARA membership amplifies individual companies’ influence, expands access to critical information and strengthens the entire rendering industry. When we engage, advocate and plan together, we protect not only our own operations but the long-term future of our industry. Rendering is stronger together, and that strength begins with NARA membership. **R**



TRAVIS ENVIRONMENTAL SOLUTIONS

TRAILERS THAT WILL LEAD US TO A MORE SUSTAINABLE FUTURE



Over 35 years, Travis has built a reputation of building the highest quality trailers servicing many different industries.

Travis Environmental Solutions is a new focus within Travis Body & Trailer committed to working with companies in specific industries including, but not limited to:

REFUSE • RENDERING • BIOSOLIDS • ORGANICS

Our goal with **Travis Environmental Solutions** is to showcase our commitment to the environment by working with companies focused on a more sustainable future.

877-864-4477 • TRAVISENVIRO.COM

Embracing the Change



APPI has a new testing system and will offer enhanced training this summer.

To all Animal Protein Producers Industry testing program members, thank you for your support and patience as APPI undergoes many changes. I would also like to recognize Dara John for her many years of service to APPI and without whom the program would have declined. Sometimes it takes a vacancy to realize just how much one individual did to hold everything together and support the program. Many thanks, Dara.

Finally, I would like to recognize the efforts of Amy Moulden and Brittany Shupe in leading the conversion to a new record-keeping system. Without the dedication of these two individuals, we would still be trying to perform the conversion.

While change may be difficult, it is necessary for continuous improvement. We have almost completed our initial phase of change with the new registration

and online sample submission system. While there have been a few speed bumps, all of you have provided grace and patience during this time. We have almost completed this conversion and are looking forward to the next steps.

Revamped Training Programs

For the training programs, APPI is moving to the next level for our members. Last fall, we took the initial step towards this with help from Pilgrim's and Kemin, which hosted the first round of improved training sessions (thank you, Dr. Pond, Dr. Bennett, Josh Lankford and many others). We will offer the new programs again this year — this time hosted by Tyson Foods.

Dr. B.J. Bench and Hilary Carrera will host the Code of Practice training as well

as an additional session on laboratory methods at the Tyson headquarters in Springdale, Arkansas. Another Preventive Controls Qualified Individual course for the Food Safety Modernization Act is planned for later this year.

To register for the COP and laboratory methods trainings, see registration information on page 39.

Finally, the third pillar of our APPI program will be refreshed and launched later this year. The COP audit will be reworked and aligned with both our traditional core values as well as our new focus. This program will focus on quality excellence along with the top industry standards for animal food safety — including the APPI testing program.

The goal is to produce an industry standard to assist members in driving operations excellence and increasing opportunities for international trade. Through the use of a rigorous, industry-approved program, we can demonstrate the excellence of North American rendered products.

As many of you have heard me say before, renderers are leaders. To many outside of our organization, this may seem strange from a group also known for its silence. Renderers, however, were the first to establish a voluntary microbial testing program. This was long before the Center for Veterinary Medicine established its Preventive Controls for Animal Food.

APPI's annual COP training is an industry-specific program that provides employees with guidance on animal food safety, employee safety, and operational excellence. Through this program, we are coordinating with the USDA funded, International Market Development Committee that is providing the drive for science-based, life-cycle analysis (LCA) footprint data for North America through collaborations with the Global Feed LCA Institute.

I want to thank everyone for their patience, effort and support as we advance in the rendering industry as producers of the highest-quality animal proteins and fats. **R**

CONSIGNMENT LISTING

New, Never Installed Tank Package

AVAILABLE IMMEDIATELY:

- 30,000-Gallon Three-Compartment UCO Settling Tank
- (2) 20,000-Gallon Fat Tanks
- (2) 8,000-Gallon Fat Tanks
- 1,500-Gallon Work Tank

All tanks are new and have never been installed or placed into service.

This equipment became available after the original Alloy Process Engineering customer was unable to obtain the required permitting approval for their project. As a result, the full tank package is now being offered on consignment.

Additional items include a new Perc Pan, (3) re-shelled (1" shell) 5'x14' Cookers, fully remanufactured, and other pieces of rendering equipment.

Ideal opportunity for processors seeking high-capacity storage or rendering equipment at a discounted investment, without new-build lead times.

CONTACT ALLOY

salesinfo@alloyprocess.com | www.alloyprocess.com





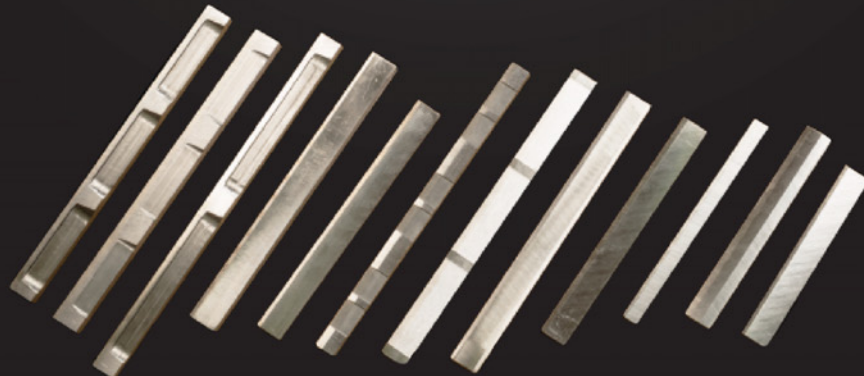
INDUSTRIAL
HARDFACING, INC

60 YEARS
1964 — 2024

TAKING THE GAME TO A WHOLE NEW LEVEL



Now offering Hardfaced Cage Bars with Integrated Spacers



SUPPLIER OF OIL SEED AND RENDERING PROCESSING SOLUTIONS

DEMAND PERFORMANCE



OSHA Inspections and the 4th Amendment: Understanding Legal Limitations and Effective Inspection Management

Employers facing inspections by the Occupational Safety and Health Administration must navigate an increasingly complex enforcement landscape. OSHA must have probable cause and a neutral basis to open an inspection. An employer must raise any concerns with the legal underpinning of an inspection at the inception — or likely waive its legal defenses. Even without a total legal defense, the legal scope of the inspection will indicate how the inspection should be managed to minimize civil and criminal liabilities.

Understanding Scope, Legal Basis for OSHA's Inspection

As we have discussed in prior articles, employers must report serious injuries and hospitalizations in a timely manner as required by OSHA regulations. Employers should provide appropriate and considered responses to OSHA complaint letters and Rapid Response Investigation forms. If OSHA chooses to open an inspection at the employer's worksite, employers

should present a professional, organized response team and make a good first impression.

At the opening conference, the employer needs to understand why OSHA is on-site and the basis for its legal authority to inspect. If there is an inadequate legal basis — such as the complaint is stale and outside the Occupational Safety and Health Act's statute of limitations, the wrong employer or worksite, or the cited National Emphasis Program is inapplicable to the worksite's North American Industry Classification System code — the employer must clarify and consider halting the inspection.

Consulting outside legal counsel at this stage is recommended. If you let OSHA into the worksite to inspect, even "under protest," your acquiescence to the inspection likely will constitute a waiver of your legal defense to the unlawful inspection. Any evidence obtained during the inspection can be used against you to issue citations.

If the legal basis to inspect is sound and you allow OSHA into

the worksite to conduct its inspection, the stated legal basis shall serve as guardrails for the limited “scope” of the inspection. The inspection should be managed in such a way that OSHA stays within that scope relative to the terms of the physical portions of the worksite OSHA is allowed to inspect, employees who may be interviewed (in a reasonable time, place and manner), and the documents that must be produced for review.

Probable Cause Required Under 4th Amendment

OSHA cannot inspect a workplace simply because of an OSHA employee’s whim or bias. The agency’s authority to inspect is shaped by the U.S. Constitution under the Fourth Amendment’s limitations on searches and seizures. Since *Marshall v. Barlow’s Inc.*, OSHA has been required to demonstrate administrative probable cause — either through a neutral inspection plan or specific evidence of a hazard a potential violation.

OSHA can request entry but cannot enter over objections without a judicial warrant. OSHA’s practice reflects that limitation. The agency generally seeks a warrant only when an employer refuses entry or when OSHA believes its inspection has been improperly impeded.

In practice, the latter scenario is rare. Most employers cooperate with OSHA inspections, with an eye towards prompt completion and limiting the number and frequency of OSHA personnel on-site. If OSHA were to come to the wrong worksite, however, and inspect the wrong employer or rely on the wrong emphasis program, employers must raise their objections at the opening conference and prevent the inspection from going forward or risk waiving those defenses.

OSHA sometimes opts not to pursue the inspection but could treat a refusal to allow access to equipment or areas within the defined scope of an inspection as an impediment, justifying a warrant request. The agency offers guidance to its compliance officers regarding the need for a warrant in this scenario.

If an employer continues to object to the inspection of areas beyond the scope of an inspection, OSHA is to report the refusal and consult with a solicitor to determine if a warrant is needed. This broader inspection warrant, again, can only be sought when there is a reasonable belief based on specific evidence (injuries or illnesses recorded in both OSHA forms 300 and 301, employee statements or plain view observations) that violative conditions could be found in other areas of the workplace.

Importantly, OSHA warrants — though administrative in nature — are issued by federal magistrate judges and executed with the support of U.S. Marshals.

Criminal Exposure Remains Limited but Real

While OSHA inspections are civil by default, employers should remember that criminal liability is possible under Section 666(e) of the OSH Act. Criminal charges may arise when:

- A workplace fatality occurs.
- OSHA identifies a willful violation of a specific OSHA standard (not the General Duty Clause).

OSHA also involves the U.S. Department of Justice to pursue criminal charges where employers lie during inspections, backdate documents, destroy evidence or otherwise obstruct justice.

Subpoenas: A Separate, Broader Tool

OSHA on-site inspections are comprehensive (wall-to-wall) or partial (relating to specific hazards in a complaint or injury report). Partial inspections can be geographically limited to the areas of the facility relevant to the complaint or injury report. They can also be limited in terms of the employees who are interviewed and the programs that are provided, which need to be relevant to the scope of the inspection.

OSHA’s subpoena power — its ability to issue formal requests for documents and enforce them in federal court — is broader than its power to do an on-site inspection. Unlike on-site inspections and warrants, the items requested in subpoenas do not require probable cause. Instead, under *Donovan v. Lone Steer Inc.* and the Supreme Court’s seminal *U.S. v. Morton Salt* decision, an administrative subpoena is valid if:

1. The inquiry is within the agency’s authority.
2. The demand is not too indefinite.
3. The information sought is reasonably relevant to the agency’s statutory purpose.

Courts have repeatedly emphasized that *Barlow’s* does not apply to subpoenas. Agencies — including OSHA — enjoy broad investigatory authority, “akin to that of a grand jury,” which they may exercise even merely on suspicion that the law is being violated. OSHA advises its personnel that “an administrative subpoena may be issued whenever there is a need for records, documents, testimony or other supporting evidence necessary for completing an inspection or an investigation of any matter falling within OSHA’s authority.”

In addition, unlike administrative warrants, OSHA can issue and enforce its own subpoenas.

That said, relevance still matters. Employers are not without recourse when OSHA seeks documents far afield from the inspection’s scope. For example, a request for a facility-wide hazard communication program, or generally a “safety and health program,” may not be reasonably relevant to a forklift-related complaint or injury. Employers can and do push back successfully when OSHA overreaches.

What Employers Should Take Away

Employers should understand potential legal challenges to inspections and litigate warrants as necessary. Employers should actively manage OSHA inspections as described above. Employers must also remain attentive to:

- Inspection protocols: Understand when OSHA may seek a warrant and what constitutes an “impediment.”
- Subpoenas for documents: Evaluate subpoena demands for relevance and specificity — overbreadth can be challenged.
- Criminal exposure: Recognize the limited but significant circumstances under which OSHA inspections can lead to criminal liability.
- Agency trends: Monitor whether OSHA shows interest in expanding its practices in the future.

As always, a thoughtful, informed response strategy — grounded in an understanding of OSHA’s actual authority — is the best way to navigate inspections and document demands. **R**



A Patented SRM Removal System

A new system designed to improve safety, efficiency and sanitation in rendering plants — while helping prevent the spread of bovine spongiform encephalopathy (BSE) — has been developed and brought to market by Altena Engineering LLC.

The company's patented "One Hole Method" removes specified risk material (SRM) from cattle carcasses using its specialized vacuum and jetting system, the JetVac-01 Cattle Material Prohibited from Animal Feed removal skid. The method was developed by three individuals: Roger Kooima, inventor; Cody Altena, master engineer and manufacturer; and Tim Postma, a fourth-generation renderer. After reviewing traditional SRM removal procedures, the team sought to create a safer, more streamlined alternative.

Historically, SRM removal required cutting off the head, suspending the carcass on an overhead rail and manually extracting brain and spinal cord material with multiple cutting tools. The process was labor-intensive, time-consuming and physically demanding.

The One Hole Method simplifies the procedure to a task that can be completed in less than two minutes. The carcass remains

flat on the plant floor while the operator cuts a circular opening in the skull using a standard hole saw.

A vacuum nozzle removes brain material through the opening. A hot, high-pressure water jetter lance is then inserted through the nozzle and guided down the spinal column, breaking apart the spinal cord and flushing it back toward the skull. The high-volume vacuum simultaneously removes the material into a separator tank, where solids are separated from water for proper disposal.

According to Altena Engineering, the system reduces manual handling, lowers injury risk, improves sanitation and maintains compliance with regulatory requirements for SRM removal.

The design also improves disease surveillance testing. Workers can retrieve the obex — a section of the brainstem required for BSE testing — directly through the skull opening without removing the head. Keeping the head attached eliminates the need for separate tagging and tracking.

JetVac-01 CMPAF removal systems have been in continuous commercial operation for more than three years. Units are currently installed in rendering facilities throughout the Midwest, collectively processing hundreds of cattle each week and saving operators significant labor and operational costs. **R**

Renderers Receive Nearly \$1.8 Million in MAP, FMD Funding

The North American Renderers Association welcomed an announcement from the U.S. Department of Agriculture in February on 2026 export market development allocations in which NARA was designated to receive nearly \$1.8 million through the Market Access Program and Foreign Market Development programs to support U.S. rendered product exports abroad.

The MAP and FMD allocations reflect the Trump administration’s ongoing commitment to strengthening U.S. agricultural exports and ensuring that American producers stay competitive in global markets, NARA stated in a press release.

“USDA’s continued investment in MAP and FMD funding reflects its recognition of the strategic importance of export promotion and market diversification for U.S. agricultural producers and processors,” said Kent Swisher, NARA president and CEO. “These funds provide essential support that allows our industry to compete and grow in dynamic global markets.”

NARA leverages MAP and FMD resources to build market demand, support foreign regulatory and plant registration efforts, intervene during trade disruptions and cultivate trusted relationships with overseas trading partners. Maintaining in-country representation — particularly where other programs may not be eligible — often makes the difference between success and stagnation in these markets.

“Our annual MAP and FMD allocations are critically important to our ability to have staff and activities in Greater China — including Hong Kong — and Mexico because those markets are not currently eligible for the \$6.3 million in funding we received under the Regional Agricultural Promotion Program,” said Dana Downing, NARA’s senior vice president of international programs. “These trade facilitation efforts are essential for helping members navigate commercial and regulatory issues, and having dedicated local representation helps build trust with our trading partners that simply can’t be replicated remotely.”

Amsterdam Bans Meat Advertising in Public Spaces

As of May 1, Amsterdam, the capital of the Netherlands, will ban advertising of meat in public spaces. The measure, approved by 27 of the 45 members of the Amsterdam Municipal Council, also bans advertising for gas-powered vehicles, air travel and cruise vacations. Amsterdam is reportedly the third Dutch city to implement such a ban while several others are exploring similar actions. The bans are part of the government’s efforts to push consumers toward plant protein instead of animal protein and, allegedly, to help combat climate change.

People, Places and ...

Camlin Fine Sciences Appoints Weber Senior Sales Director

Camlin Fine Sciences has appointed Dr. Melissa Weber as senior sales director—animal. In this role, Weber will lead commercial strategy and customer engagement across CFS’s animal business, with a focus on accelerating growth, strengthening technical collaboration and delivering practical solutions to customers.

Weber brings more than 15 years of experience across research and development, innovation and technical sales, with deep expertise in pet food and animal nutrition. She is well known across the pet food industry for her ability to connect technical insight with commercial execution and build strong, long-term customer partnerships.

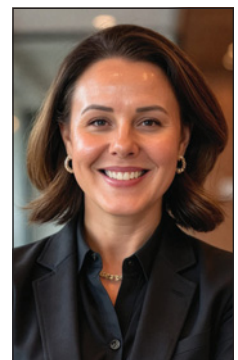


Most recently, she served as director of technical services at Wilbur-Ellis/Rangen, where she led innovation strategy and technical sales enablement, aligning research and development, sales and operations to deliver commercially viable solutions and measurable growth. Her background in animal science, combined with hands-on experience in product development and customer-facing roles, allows her to translate

technical complexity into practical solutions that perform in real production environments.

Fennig Named PFI President, CEO

Elise Fennig was named president and chief executive officer of the Pet Food Institute. Fennig brings extensive experience leading national trade associations and advancing collaborative, member-driven strategies across the food and consumer products sectors.



Most recently, she served as chief of staff and senior vice president of industry engagement at the National Confectioners Association, where she oversaw organizational operations, strategic initiatives and cross-functional teams supporting membership and events, industry affairs and global engagement.

Previously, she held leadership roles at the Consumer Brands Association (formerly the Grocery Manufacturers Association), the American Frozen Food Institute and, more recently, Kraft Heinz. Fennig holds a graduate degree in public relations from the University of Florida and a bachelor’s degree in foreign affairs and Spanish from the University of Virginia. **R**

Why Join NARA?

Because access, advocacy, and insight matter.

As a NARA member, you gain:

- Access to 180+ rendering facilities across North America.
- Representation on Capitol Hill and engagement with the EPA.
- Invitations to industry-defining meetings and events.
- Exclusive data, technical resources, and regulatory updates.
- Global trade support and export advocacy.
- A direct connection to the full rendering industry — from plants to partners.



Join the companies powering rendering.

Amy Moulden | amoulden@nara.org



APPI Code of Practice Training

May 19-20

About: This two-day training brings together experienced leaders from across the global animal production ecosystem to share practical insights on operations, feed safety, regulatory expectations and emerging technologies.

Designed for professionals responsible for execution — not theory — this event emphasizes peer-to-peer learning, candid discussion and real-world application. Sessions focus on how best-in-class organizations operate, adapt and lead in complex manufacturing and regulatory environments.

Attendees will leave with actionable takeaways, broader perspective, and stronger industry connections.

Core Focus Areas Include

- Processing system management and optimization.
- Integration of quality and food safety into operational leadership.
- Adoption of rapid and inline analytical technologies to enable stronger process control.
- Foreign material risk identification, prevention and response.
- Building maturity in regulatory engagement and compliance interpretation.
- Alternative proteins and functional ingredient innovation across species and markets.
- Preparing organizations for an increasingly complex global supply chain landscape.



Use this QR code for registration and hotel suggestions.



THE ANIMAL PROTEIN PRODUCERS INDUSTRY

Applied Laboratory Excellence

May 21-22

About: Applied Laboratory Excellence is an APPI-aligned training program developed for laboratory, quality and food safety professionals responsible for generating and interpreting data used in food and feed manufacturing decisions.

Designed for practitioners — not academics — this program emphasizes hands-on learning, applied problem solving and real-world relevance. Participants will explore how sampling, reference methods, rapid technologies, chemistry, microbiology and advanced analytics come together to support risk-based decision-making.

Attendees will participate in hands-on training, applied exercises and case-based discussions that reflect real challenges faced by rendering, pet food, aquaculture and livestock feed operations.

Core Focus Areas Include

- Translating APPI risk-based principles into laboratory practice.
- Sample handling, methodology and chain of custody as foundational controls.
- Reference methods and their role in enabling rapid and inline technologies.
- Proper use and interpretation of NIR and other rapid analytical tools.
- Laboratory indicators of lipid oxidation, protein degradation and digestibility risk.
- Microbiological programs as verification tools, not standalone tests.
- Emerging analytical technologies and their regulatory relevance.
- Using laboratory data to support confident, defensible decision-making.

Location:

Tyson Foods Headquarters
2200 W. Don Tyson Pkwy
Springdale, AR. 72762

Questions:

Contact Dr. Charles Starkey at cstarkey@nara.org.

Mark Your Calendar

April 2026

NARA Spring Business Meeting

April 13-15, Chicago, IL • nara.org/about-us/events

National Rendering Day

April 21 • Don't forget to celebrate on social media and otherwise.



Pet Food Forum

April 27-29, Kansas City, MO • petfoodforumevents.com

May 2026

American Oil Chemists' Society

May 3-6, New Orleans, LA • annualmeeting.aocs.org

Animal Agriculture Stakeholders Summit

May 5-7, Kansas City, MO • animalagalliance.org/initiatives/stakeholders-summit

93rd World Organization for Animal Health General Session

May 18-22, Paris, France • woah.org

APPI Code of Practice

May 19-20, Springdale, AR • nara.org/about-us/events

APPI Laboratory Methods Training

May 21-22, Springdale, AR • nara.org/about-us/events

European Fats Processors and Renderers Association Congress

May 27-30, Tenerife, Spain • efpra2026tenerife.com

June 2026

NARA Congressional Fly-In

June 1-3, Washington, D.C. • nara.org/about-us/events

NARA Central Region Annual Meeting

June 9-11, Galena, IL • nara.org/about-us/events

American Feed Industry Association's Feed Industry Institute

June 15-18, Minneapolis, MN • afia.org/events/fii

State of the Science Summit

June 16-18, Davis, CA • clear.ucdavis.edu

Global Alliance of Pet Food Associations Technical Congress and Annual General Meeting

June 21-24, Ottawa, Canada • gapfa.org/gapfa-events

Pet Food Alliance Technical Meeting

June 24-25, Canyon, Texas • sites.google.com/rams.colostate.edu/pet-food-alliance-2026-technic?usp=sharing

August 2026

Quarterly NARA Committee Meetings

Aug. 13 • Virtual

National Safety Conference for the Poultry Industry

Aug. 17-19, Destin, FL • uspoultry.org/programs/education/seminar

September 2026

Australian Renderers Association Symposium

Sept. 15-17, Melbourne, Victoria, Australia • ausrenderers.com.au/en/symposium

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

MOVING??

Change your address at

www.rendermagazine.com/subscribe

Use your account

number on this issue's
cover label.

You can also renew
your subscription
at the same time!

Advertisers

A&S Thai Works.....	23
Alloy Process Engineering Inc.	32
APPI.....	39
Baker Commodities Inc.	Back cover
Biobased Diesel Daily	28
Brown Industrial	21
Camlin Fine Sciences.....	19
Dupps Company.....	7/Inside Back Cover
GEA	24
Haarslev Inc.	1

Industrial Hardfacing, Inc.	33
Kemin	2
NARA	20/38
Oestergaard Inc.	3
Onken Inc.	5
Rangen	25
RoseDowns	29
Travis Environmental Solutions.....	31
West Coast Reduction Ltd.....	Inside Front Cover

Growth + Stability = Opportunity

JOIN THE WINNING TEAM AT DUPPS

"Working at Dupps means doing work that matters. We all take pride in making equipment that keeps essential industries running."



With industry-leading benefits and top compensation packages — and a track record of stable growth that keeps our people steadily employed, even when other companies lay off workers — The Dupps Company is a great place to work.

We offer rewarding opportunities in Ohio, Georgia, Iowa, Kentucky, and Oklahoma for positions in:

- Field Construction Management
- Engineers
- Customer Service/Sales
- Electrical Controls/Instrumentation
- Heavy Rigging Specialists
- Rendering Troubleshooting & Training
- Code Welders
- Business Analytics
- Layout/Design
- Process Engineers
- Machining Specialists

"Proud to work for a mission-driven company that pairs constant innovation in technology and process with a dedicated focus on wellness, community, and Veteran support."



As part of the Dupps family, you'll enjoy a supportive, professional work environment where your contributions will be valued, and your career development encouraged.



Apply today – email Michelle McClain, Human Resources Director at MMcClain@dupps.com or visit Dupps.com/careers.html

WHEN GREASE GETS OUT OF CONTROL...

BAKER COMMODITIES SAVES THE DAY!



**PROBLEM
SOLVED!**

**SINCE 1937, BAKER COMMODITIES HAS BEEN ON
AN ACTION-PACKED QUEST TO TRANSFORM WASTE STREAMS
INTO RENEWABLE ENERGY AND GLOBAL COMMODITIES!**

BECAUSE THAT'S WHAT HEROES DO.

CORPORATE ADDRESS:

4020 BANDINI BLVD. VERNON, CA 90058

CORPORATE PHONE: 323-268-2801

CALL TOLL FREE: 855-422-5370

WWW.BAKERCOMMODITIES.COM



Baker Commodities, Inc.
Recycling for Life®