



International
Feed
Industry
Federation
Annual Report
2022/23



International Feed Industry Federation

ANNUAL REPORT 2022/23

Welcome



In 2050 there will be over 9 billion people in the world... and the need for food will be 60% higher than today.

It is vital that the feed sector, as well as the wider agricultural chain, can meet future demands in a sustainable, safe and affordable manner, while maintaining consumer trust and confidence in the food supply chain.

WELCOME LETTERS





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International Feed Industry Federation

ANNUAL REPORT 2022/23

Welcome



In the last two years the International Feed Industry Federation (IFIF) has grown from strength to strength thanks to the engagement of our members from around the world and a sharp focus on our vision and mission as the one voice for the global feed industry.

We invite you to explore the 2022/23 IFIF Annual Report and see for yourself.

WELCOME LETTERS



Welcome Letters



RUUD TIJSSENS
Chairman IFIF 2022/23

The feed industry is at the center of one of the most significant challenges facing our societies in the next decades: how to feed a growing world population and do so safely, sustainably and affordably.

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ALEXANDRA DE ATHAYDE
Executive Director IFIF

In 2022/23 IFIF continued to focus strongly on our vision and mission with our work centered on three strategic pillars, which reflect the key priorities of IFIF to support our industry on the road to the future.

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Letter from the Chairman

RUUD TIJSSENS, CHAIRMAN IFIF 2022/23

Dear IFIF Members, dear friends and colleagues,

We have had some remarkable and challenging developments over the last few years. We are living in unprecedented times, in which the global livestock industry had to answer many unexpected and unprecedented challenges, resulting in logistical problems and strongly volatile prices, affecting everyone around the globe. And this makes clearer than ever before: the animal production sector is an essential part of our societies.

In the setting of the current global situation, food security has again become a critically important topic. Through innovation and science-based approaches, we as the feed industry will continue to advance novel feeds and feed sources, innovative specialty feed ingredients and feed additives. All to ensure a more productive, efficient, and sustainable livestock chain that will support feeding the world now and in the future, as global demand for livestock products continues to increase.

In meeting these future demands, I believe sustainability – produce more with using less high-quality and safe livestock products at an affordable cost under efficient production systems – is not optional.

Animal nutrition, through its continuous advancements, continues to be an essential part of the solution to make the livestock production chain more sustainable. It supports animal health and welfare, as well as productivity and allows farmers to produce more with less and optimize environmental resources. This is applicable to farmers in high-income countries, as well to smallholder farmers in low- and middle-income countries.

I am pleased to report that the International Feed Industry Federation (IFIF) with our global membership, representing over 80 percent of animal feed production, is fully

engaged in meeting these challenges and providing a unified leadership for our industry in the food chain that provides sustainable, safe, nutritious and affordable food for a growing world population. And through all of this do our part to 'feed the world' now and in the future.

As you will see in this IFIF Annual Report 2022/23, our Federation continues to work on a number of strategic projects, which will positively impact the environmental footprint, the international regulatory framework, as well as the efficiency of our sector, while supporting capacity development for feed safety in key world regions.

In January 2023, many of you joined us for first face-to-face International Feed Regulators Meetings (IFRM) in Atlanta following two years of virtual meetings during the global Pandemic. It was a very successful event and I am pleased that the IFRM, organized by IFIF together with Food and Agriculture Organization of the United Nations (FAO), continues to grow and attract government officials and IFIF members from around the world. I am confident that the IFRM will continue to be the essential meeting where the public and private sector can collaborate on essential topics for the feed and food sector, such as food safety and nutritional innovation.

The success of our joint IFRM, as well as our long-standing partnership on capacity development in feed safety and spreading of good feed manufacturing practices, are just two highlights of the strong collaborative relationship between IFIF and FAO dating back many years.

In 2010 FAO and IFIF published the "Manual of Good Practices for the Feed Industry", which has been released in English, Chinese, Arabic, French and Spanish and distributed widely to the feed sector professionals and operators. In 2020, IFIF and FAO fully updated and revised this important manual to address the recent developments in feed production and benefit from latest scientific and technical knowledge. In 2023 this new Manual is being translated into Chinese and Vietnamese.

IFIF is also an active participant in the FAO-led Global Agenda for Sustainable Livestock (GASL), and an official stakeholder in the Livestock Environmental Assessment and Performance (LEAP) Partnership. IFIF will continue to be strongly engaged in these efforts and I am very pleased that LEAP in 2022-2023 published important guidance document on feed additives and methane emissions, which our IFIF experts contributed to.

IFIF also strengthened its long-standing relationships with the Codex Alimentarius Commission, the World Health Organization (WHO) and the World Organization for Animal Health (WOAH).

In addition, over the last two years we launched a number of important new initiatives, which will benefit not only IFIF members, but also the wider feed chain.

In 2022, LEAP launched a Technical Advisory Group (TAG) on circular bio-economy and I am very pleased that not only is IFIF providing an expert for this important TAG, but we have also set up an internal IFIF working group on circular bio-economy to support these efforts.

Feed safety continues to be a key mission for IFIF and in 2023 we carried out a review of biosecurity practices used by national and regional IFIF Feed Association Members to elaborate an IFIF Biosecurity Guidance for Feed Mills globally. I want to thank our Member Associations for contributing to this important work, which aims to protect feed mills from the entry of diseases and ensure diseases are not amplified when sending out manufactured feed products.

We continue to strengthen and widen our collaboration with our Livestock Chain partners, including the International Meat Secretariat (IMS), the International Poultry Council (IPC), the International Dairy Federation (IDF), the World Farmers Organization (WFO), HealthforAnimals, and the Global Dairy Platform, coordinating input with them into various international bodies, including the UN FSS process, Global Agenda for Sustainable Livestock (GASL) and the Private Sector Mechanism of the Committee on Food Security (CFS).

In 2023, the IFIF Sustainability Committee developed a key document outlining 'The Role of the Animal Feed Industry in Supporting Sustainable Livestock Production', which formed the basis of my presentation in September 2023 at the first ever FAO Global Conference on Sustainable Livestock Transformation, where I highlighted that animal nutrition is essential to bring the livestock sector production to new standards of sustainability, environment sustainability, animal health and animal welfare.

In 2022, we updated the IFIF e-learning course on 'Good Production Practices in the Feed Industry', an online training programme based on the IFIF FAO Feed Manual of Good Practices for the Feed Industry, which focuses on increasing safety and feed quality at the production level. In 2023 IFIF translated the course into Spanish.

I am also pleased that the important IFIF work on Nutritional Innovation continues. Many IFIF Members are engaged in this and the work has already highlighted how the feed sector plays a critical role in supporting animals' optimal health with high resilience capabilities to stressors through safe and high-quality feed (feed formulation and processing) and access to nutritional innovation.

In 2023 IFIF launched the 'IFIF Nutritional Innovation Toolkit', which contains key documents and messages to support engagement with stakeholders and regulators as we demonstrate the positive role of adequate nutrition for the maintenance of animal health and welfare and resilience of animals to stressors.

Looking ahead at 2024, we will continue our clear focus on IFIF's three strategic pillars,

including (1) regulatory to promote a balanced regulatory framework and support the dynamic pace of innovation, (2) sustainability with science-based standards and innovation to contribute to support sustainable livestock production, as well as (3) education & best practices.

We will continue to drive key initiatives, including IFIF's Nutritional Innovation work to support animal health and welfare, capacity development for feed safety programmes, as well as the IFIF FAO International Feed Regulators Meeting (IFRM) series.

And we will work closely with our global partners and stakeholders to support the sustainable development of animal production and the UN Sustainable Development Goals, and IFIF will continue to champion science-based decisions, the need for continued innovation and better technologies, as well as regulatory convergence and free and fair trade.

Each of these initiatives and our successes would not be possible without our IFIF members' engagement in our expert committees, as well as the support of the IFIF Board of Directors and the IFIF Executive Committee. I want to thank all of you for your valuable involvement and your continued strong support of our Federation.

Finally, over the last two years, our Federation continued to increase its membership and geographical reach and I want to again welcome all our new Members to the IFIF family!

I want to thank Alexandra de Athayde, IFIF's Executive Director, for her outstanding leadership and together with Sebastian Csaki, for their continued excellent work and dedication to IFIF.

It has been a pleasure to serve as your Chairman over the last two years and to lead the organization in such exciting times. I am honored that IFIF's 36th General Assembly re-elected me as IFIF Chairman for the 2024-2025 term and I want to thank you for the trust you have placed in me.

I look forward the next two years and together we will continue to work towards meeting future challenges and advance our industry for the benefit of people all around the world.

Yours sincerely,



Ruud Tijssens
Chairman 2022 – 2023
International Feed Industry Federation



Letter from the Executive Director

ALEXANDRA DE ATHAYDE, EXECUTIVE DIRECTOR IFIF

Dear IFIF Members, dear Colleagues, dear Friends,

I am pleased to report that in 2022 and 2023 our Federation has initiated and participated in a number of important activities, while strengthening our relationship with key stakeholders across the livestock chain, and solidifying IFIF's position as the voice for our industry globally and attracting new members to our Federation.

The challenges over the last years have highlighted to the world that the feed industry is an essential participant in the food chain. Within this context, IFIF has continued to focus strongly on our vision and mission with our work centered on three strategic pillars, which reflect the key priorities of IFIF to support our industry on the road to the future.

This 2022-2023 IFIF Annual Report highlights the work we have undertaken and details our accomplishments and how we have managed to positively impact our industry by working together with our members and stakeholders.

This report also includes updates from all our national and regional association members, including feed and livestock production statistics, and I want to thank all of them for their contributions.

The IFIF family continues to grow and I want to recognize and welcome our new IFIF members, which joined in the last two years. These organizations all are contributing to IFIF's mission and vision and we thank them for supporting IFIF's work:

Corporate Members: Biorigin, Bond Pet Foods, Eastman, Herbonis, Natural Remedies.

Feed related members: Format Solutions, a Datacor Company and Ag Growth International (AGI).

Finally, this report provides an accounting of our organization's structure, our membership, as well as our Board of Directors and Executive Committee.

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I want to thank our dedicated 2022-2023 standing Committee Chairs Leah Wilkinson (Regulatory), David Bray (Sustainability), and our Nutritional Innovation Working Group Chair Karine Tanan, as well as Duncan Rowland for chairing both the Biosecurity and the Circular Economy WGs. I also want to thank all the Members of our expert Committees and Working Groups, as well as our IFIF Technical Expert Philippe Becquet, for their support and expertise, which underpin IFIF's accomplishments.

I want to thank our Treasurer, Dr. Bruno Kaesler, for his continued oversight of the Federation's finances,

I want to thank our Chairman for 2022-2023, Ruud Tijssens, for his leadership and vision for IFIF over the last two years and we are looking forward to his continued dedication and contribution to IFIF for the next two years following his re-election as IFIF Chairman 2024-2025 at IFIF's 36th General Assembly.

Last but not least, I want to thank our dedicated Executive Committee and our entire Board of Directors for their time, engagement and continued and strong support of IFIF's mission and work.

We kicked off 2022 with a strategic IFIF membership survey to provide an opportunity for IFIF members to feedback their view of priorities and projects. The positive survey results confirmed IFIF Members' alignment with the agreed IFIF priorities under our three strategic Pillars suggesting our Federation is on the right track going forward.

Pillar I: Sustainability

One of the key parts of IFIF's mission is to continue to support and encourage the sustainable development of animal production. To this end, IFIF has developed a number of strategic initiatives to measure and benchmark the environmental performance of the livestock production chain.

Recognizing the continued high importance of Sustainability, in 2023 the IFIF Sustainability Projects Steering Group was established as the IFIF Sustainability Committee. The Committee is composed of high-level experts drawn from our membership, worked over the last two years to closely align and cross-leverage our existing sustainability initiatives, while providing thought leadership for IFIF in this critical area.

In 2023, the IFIF Sustainability Committee developed a key document outlining 'The Role of the Animal Feed Industry in Supporting Sustainable Livestock Production' which for the first time clearly highlights the possible contributions of animal nutrition to support a sustainable livestock transformation.

IFIF continues to provide leadership and expert input to the multi-stakeholder FAO-led sustainability initiatives, including the Global Agenda for Sustainable Livestock and the Partnership on Livestock Environmental Assessment and Performance (LEAP). In 2022 and 2023 IFIF worked to support LEAP+, both through our work in the Steering Committee, as well as by providing IFIF experts to the LEAP Technical Advisory Groups (TAG) on Methane in 2022 and Circular Bio-Economy in 2022-2023. We will continue to support this important initiative in 2024 as Leap Phase 4 moves into Phase 5.

When LEAP launched the TAG on circular bio-economy not only is IFIF providing an expert for this important TAG, but we have also set up an internal IFIF working group on circular bio-economy to support these efforts.

IFIF is a founding member of the Global Feed LCA Institute (GFLI), which is working to use the LEAP methodology to develop a global standard for assessing and benchmarking feed industry impact and improvement in LCA calculation and we remain committed to support the broadening of this initiative to other world regions.

Following the launch of the LEAP guidelines on the environmental performance of feed additives in livestock supply chains, IFIF as part of its commitment to support the practical implementation of LEAP guidelines, worked in 2022 and 2023 with FEFANA and GFLI via two joint Working Groups to facilitate the implementation of these guidelines.

The last two years we worked to finalize the Specialty Feed Ingredients Sustainability Project (SFIS), which has now completed Phase 3. The aim was to achieve a harmonized approach for the assessment of the use of SFIs in animal feeding on a cradle to farm gate approach and I am very pleased that SFIS was able to provide a helpful base for the development of the LEAP feed additive guidance.

Pillar II: Regulatory & International Standards

Another key part of IFIF's mission is to support worldwide trade and ensure that future demands for feed and food can be met efficiently. IFIF works to promote a balanced regulatory framework to support a fair global playing field to facilitate market access and support the competitiveness of the feed and livestock industries.

The 16th International Feed Regulators Meeting (IFRM) held in Altana in January 2023 and organized by IFIF in cooperation with the Food and Agriculture Organization of the United Nations (FAO) for the first time since the Pandemic brought together face-to-face record numbers of feed industry representatives and government officials from around the world to discuss critical issues facing the feed sector with IFIF and the FAO. On a personal note, it was wonderful to see many of you again in person after the Pandemic.

In 2022 we held the 15th IFRM as a virtual event, and despite not seeing each other face-to-face, we broke attendance records and reached feed regulators and IFIF members from around the world, who traditionally have not been able to travel to Atlanta.

IFIF is a founding member of the International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF) and I am happy to report this important international cooperation has continued to grow and produce important and well received public guidance documents.

IFIF holds an official liaison status with the International Organization for Standardization (ISO) Technical Committee ISO/TC34/SC10 to work on animal feeding stuffs and I am pleased IFIF is able to input into relevant feed related work ISO work as needed.

At the end of 2022, the IFIF Taxonomy Name Changes Working Group, completed their work 'Taxonomy Name Updates' messages developed by WG with the objective to explore / identify different options on how to address taxonomy name updates globally and raise awareness with regulatory bodies around the world.

IFIF joined global regulators at the annual Sessions of the Codex Alimentarius Commission (CAC) in 2022 and 2023, where together with the FAO, we kept feed safety on the agenda.

As a Codex Observer organization, IFIF was also actively involved in a number of important Codex electronic Working Groups, as well as active in the Codex Committee on Contaminants in Foods (CCCF), the Codex Committee on Residues of Veterinary Drugs in Foods (CCVRDF), the Codex Committee on Food Import and Export Inspection and Certification Systems (CCFICS) and the Codex Committee on Food Labelling (CCFL). We will continue to provide expert input into the various Codex WGs and Committees in the years ahead.

IFIF joined the World Organisation for Animal Health (WOAH) 90th and 91st General Session, highlighting our on-going support in the development, updating and implementation of WOAH standards and guidelines to contribute to improved animal health and productivity.

In 2022 and 2023 the important work by the IFIF working group on Nutritional Innovation continued at pace, and among other things the work has already highlighted how the feed sector plays a critical role in supporting animals' optimal health with high resilience capabilities to stressors through safe and high-quality feed (feed formulation and processing) and access to nutritional innovation.

In 2023 IFIF launched the 'IFIF Nutritional Innovation Toolkit', which contains key documents and messages to support engagement with stakeholders and regulators as

documents and messages to support engagement with stakeholders and regulators as we demonstrate the positive role of adequate nutrition for the maintenance of animal health and welfare and resilience of animals to stressors.



Related to this topic, in 2022 IFIF was invited to join the FAO-led AMR Multi-Stakeholder Partnership as part of the private sector cluster, coordinating with our Agri-Chain Partners to support this important initiative. The Partnership Platform was launched 18 November 2022, during World Antimicrobial Awareness Week, and marked an important step towards more coordination, communication, and collaboration among a wide range of stakeholders globally to address AMR.

Pillar III: Education & sharing of Best Practices

A third key element of IFIF's mission is to support sharing of good practice and to promote science-based solutions for the feed industry and facilitate dialogue among key stakeholders.

We continue to actively share and promote the 2020 IFIF FAO fully updated "Manual of Good Practices for the Feed Sector". As you may know, this Manual was first published in 2010 and has been a valuable tool to increase knowledge and improve feed safety at the production level, and it is widely recognized and used in many countries around the world. This second publication is a fully revised, updated and expanded version of that Manual and addresses recent developments in feed production and benefits from the latest scientific and technical knowledge. It has been very well received and in 2023 new manual was translated into Chinese and Vietnamese.

In early 2023, we launched the Spanish version of the IFIF e-learning course 'Good Production Practices in the Feed Industry', an online training programme based on the updated IFIF FAO Feed Manual of Good Practices for the Feed Sector, which focuses on increasing safety and feed quality at the production level and which has reached over 500 participants in over 60 countries. IFIF partnered with the e-learning training platform Anpro Campus to develop this e-learning course to further expand the scope of the successful IFIF Global Animal Nutrition feed safety training programme 'Train the Trainer'.

Finally, in 2023 IFIF formed a Working Group on 'Biosecurity Guidance for Feed Mills' with the aim to develop an IFIF Biosecurity Manual based on existing national papers on biosecurity measures from our IFIF regional and national associations as a basis. I am proud that the WG completed their task in record time and we will work together with the FAO in 2024 to publish this important document.

Looking ahead 2024

Despite the current global challenges, 2024 promises to be an important and exciting year for our Federation. We will kick-off with our 17th International Feed Regulators

Despite the current global challenges, 2024 promises to be an important and exciting year for our Federation. We will kick-off with our 17th International Feed Regulators Meeting (IFRM) in January 2024, which promises to be another excellent meeting bringing together colleagues and regulators from around the world to Atlanta with IFIF and FAO.

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At the IFRM we will also continue to drive our feed safety capacity development efforts for 2024 and 2025 and reach out to potential partners as we plan new trainings in Africa and Asia.

In 2024, in addition to our ongoing project as well as developing new strategic engagement work on key issues (stay tuned!), we will continue our efforts to reach out to potential new members and support the building of national and regional feed associations, particularly in Africa and the Asia-Pacific region.

We will continue to strengthen our long-standing relationships with the Codex Alimentarius Commission, the World Health Organization (WHO) and the World Organization for Animal Health (WOAH).

We will also continue our close collaboration with our Livestock Chain partners, including the International Meat Secretariat (IMS), the International Poultry Council (IPC), the international Dairy Federation (IDF), the World Farmers Organization (WFO), HealthforAnimals, and the Global Dairy Platform, coordinating input with them into various international bids, including the UN FSS process, Global Agenda for Sustainable Livestock (GASL) and the Private Sector Mechanism of the Committee on Food Security (CFS).

I look forward to working with all of you to drive IFIF forward in the next years to ensure we can provide a unified leadership role for our industry in order to contribute to the sustainable, safe, nutritious and affordable food for a growing world population.

Thank you all for your continued support of IFIF.



Alexandra de Athayde
Executive Director
International Feed Industry Federation



Our Vision

IFIF's vision is to provide a unified voice and leadership to represent and promote the global feed industry as an essential participant in the food chain that provides sustainable, safe, nutritious and affordable food for a growing world population.

ONE VOICE





One Voice



Who we are

ONE VOICE FOR THE
INDUSTRY

+ READ MORE



What we do

OUR MISSION

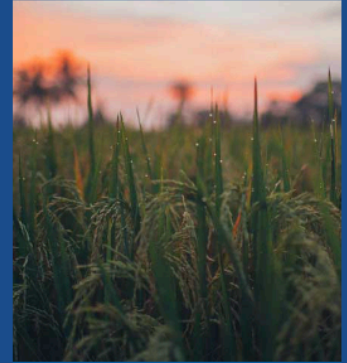
+ READ MORE



Challenge

TOWARDS 2050

+ READ MORE



Members

ACROSS THE WORLD

+ READ MORE



Who we are

The International Feed Industry Federation (IFIF) provides a unified voice and leadership to represent and promote the global feed industry as an essential participant in the food chain that provides sustainable, safe, nutritious and affordable food for a growing world population.

In 2022 and 2023 IFIF initiated and participated in a number of important activities, while strengthening our relationship with key stakeholders across the livestock chain, and solidifying IFIF's position as the voice for our industry globally.

IFIF undertook a number of projects to meet this challenge and continued to develop stronger relationships with international stakeholders, while welcoming a range of new Members to IFIF.

Over the last two years, IFIF continued its sharp focus on our strategic work plan. To support our industry on the road to the future, IFIF's work with its Members and stakeholders is centred on three strategic pillars:

- Sustainability
- Regulatory & International Standards
- Education & sharing of best practices.

IFIF is made up of national and regional feed associations from Africa, Asia Pacific, Europe, North and South America and the Middle East, as well as feed related organizations and corporate members from around the globe.

IFIF members represent over 80% of total compound animal feed production worldwide.



IFIF believes that only by working together with all stakeholders in the feed and food chain, including governments, the private sector and non-governmental groups, can we meet the demands of 60% more food, including animal proteins like beef, poultry, fish and dairy products in the future.

Given the anticipated growth of the world's population to around 9 billion people by 2050, and the associated higher demand for animal proteins like beef, poultry and fish, it is vital that we can meet this challenge in a sustainable and safe way.



IFIF helps to ensure high standards of health and welfare for animals and people, by collaborating with the United Nations Food and Agriculture Organization (FAO), the World Organisation for Animal Health (OIE), the Codex Alimentarius Commission and other international bodies to help set international regulatory standards for the whole feed chain and support fair trade.

In addition, IFIF works with governmental, private sector, and nongovernmental partners on a number of fronts to measure, benchmark and improve the sustainability of the livestock production chain.

IFIF also aims to play a proactive role to promote science-based solutions and information sharing for feed manufacturers, consumers and regulatory authorities worldwide on a variety of issues that affect the supply of safe and

IFIF also aims to play a proactive role to promote science-based solutions and information sharing for feed manufacturers, consumers and regulatory authorities worldwide on a variety of issues that affect the supply of safe and affordable animal proteins such as beef, poultry, fish and dairy products.

What we do >

Challenge >

Members >

What we do

Given the anticipated growth of the world's population to around 9 billion people by 2050, and the associated higher demand for animal proteins like beef, poultry and fish, it is vital that we can meet this challenge in a sustainable and safe way.

In 2022-2023, IFIF continued to focus on its strategy and the following five-point mission to fully support our vision:

- Represent the global feed industry with international governmental organizations and agencies, including the FAO, WTO, WHO, OIE and CODEX Alimentarius, on crucial global feed and food issues.
- Promote science-based solutions and information sharing for the feed industry by facilitating global forums, such as the Global Feed & Food Congress (GFFC) and the International Feed Regulators Meeting (IFRM).
- Promote a balanced regulatory framework to support a fair global playing field, facilitate market access and support the competitiveness of the feed and livestock industries.
- Expand the global network of national and regional feed associations and promote the adoption of international standards and global equivalency.
- Continue to support and encourage the sustainable development of animal production.

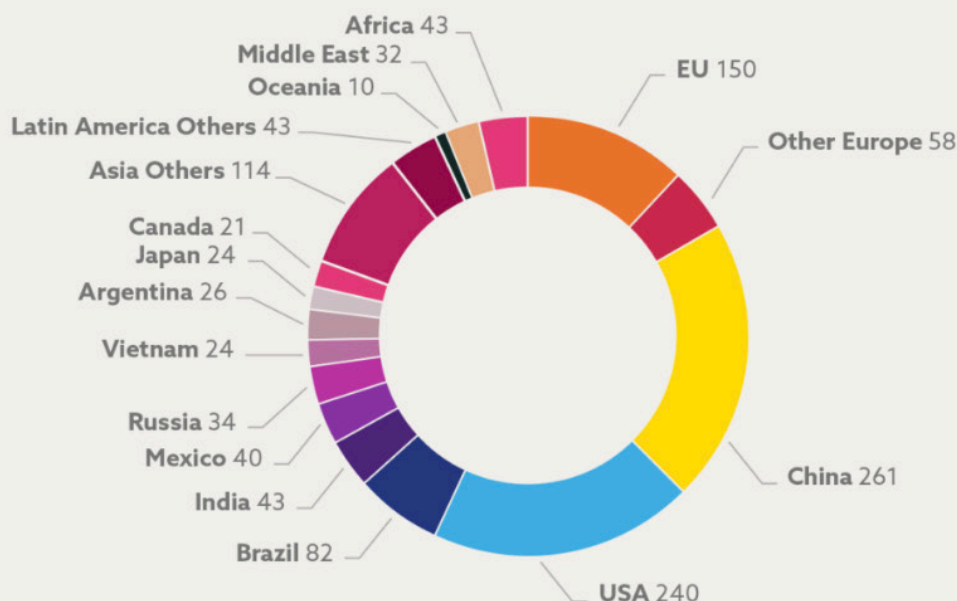
Challenge

In 2023 world compound feed exceeded an estimated 1,2 tonnes annually. Global commercial feed manufacturing generates an estimated annual turnover in excess of US \$500 billion.

The last years have continued to see an increase in the demand for animal protein worldwide, including for livestock, dairy and fish and global compound feed production now exceeds 1.2 billion tons. Generally we have seen a growth of production particularly in the developing world, with the developed world remaining more or less stable.

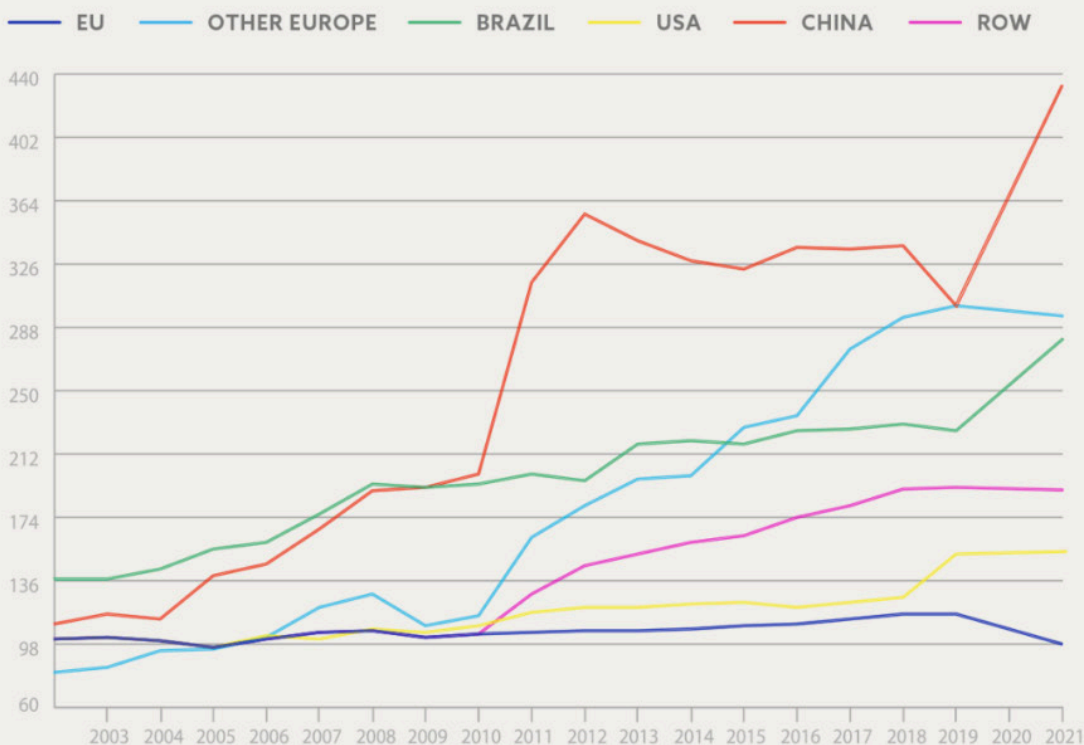
2022 GLOBAL ANIMAL FEED PRODUCTION (1245 MT.)

GLOBAL COMPOUND FEED PRODUCTION 2022 (MIO. T)



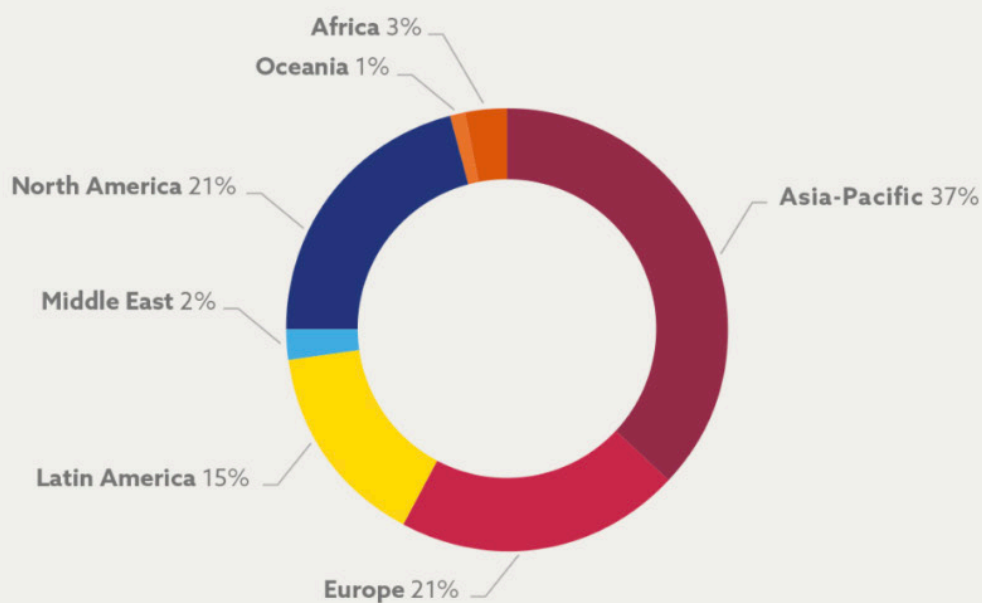
Source: FEAC / IFIF Regional and National Associations

EVOLUTION OF GLOBAL COMPOUND FEED PRODUCTION (INDEX 100 = 1999)



Source: FEFAC

FEED PRODUCTION BY REGION 2022 (MT)



Source: Source: FEFAC / IFIF Regional and National Associations

The United Nations Food and Agriculture Organization (FAO) estimates that by 2050 the demand for food will grow by 60% and that between 2010 and 2050 production of animal proteins is expected to grow by around 1.7% per year, with meat production projected to rise by nearly 70%, aquaculture by 90% and dairy by 55%.

This should be good news for the feed industry and our partners along the agri-food chain. However such growth comes with significant challenges and it is vital that our sector, as well as the wider agricultural chain, can meet these demands in a sustainable, safe and affordable manner, while maintaining consumer trust and confidence in the food supply chain.

This challenge is a global one and IFIF is a global organization. Our members are made up of national and regional feed associations, feed related organizations, and corporations, which represent over 80% of worldwide animal compound feed production.

IFIF's vision is to provide a unified voice and leadership to represent and promote the global feed industry as an essential participant in the food chain that provides sustainable, safe, nutritious and affordable food for a growing world population.

In 2050 there will be over 9 billion people in the world... and the need for food will be 60% higher than today. How do we feed this population?

To support our industry on the road to the future, IFIF's work with its Members and stakeholders is focussed on three strategic pillars, including (i) sustainability, (ii) regulatory matters and international standards, and (iii) supporting education and sharing of best practices.

Under these pillars IFIF has undertaken a number of strategic projects, which are outlined in this annual report.




WORLD PROTEIN PRODUCTION 2022 /ESTIM.) / 2023 (F'CAST) Million metric tons

PROTEIN TYPE	2022	2023	VAR.
 BOVINE	76.3	76.1	-0.2%



WORLD PROTEIN PRODUCTION 2022 /ESTIM.) / 2023 (F'CAST) Million metric tons



PROTEIN TYPE	2022	2023	VAR.
 BOVINE	76.3	76.1	-0.2%
 POULTRY	140.8	142.7	1.3%
 PIGS	122.3	121.7	-0.5%
 AQUA	93.4	96.0	2.8%
 MILK	935.9	944.0	0.9%

Source: FAO Global Food Outlook June 2023

Who we are >

What we do >

Members >

Members

IFIF is made up of national and regional feed associations from Africa, Asia Pacific, Europe, North and South America and the Middle East, as well feed related organizations and corporate members from around the globe.

IFIF is a membership driven organization and we want to thank all IFIF Members for their strong support of IFIF's work, projects and mission to ensure the feed industry continues to be seen as an essential participant in the food chain that provides sustainable, safe and nutritious food.

IFIF members represent over 80% of total compound animal feed production worldwide.





IFIF is very proud to welcome those new members to the IFIF family who joined the Federation in in 2022 and 2023. They are all key players in their field and IFIF is extremely pleased to have them on board contributing their time and expertise to support IFIF's vision and mission:

Corporate Members: Biorigin, Bond Pet Foods, Eastman, Herbonis, Natural Remedies.

Feed related members: Format Solutions, a Datacor Company and Ag Growth.

These organisations are critical players in the feed production chain and we are very pleased to be able to draw on their expertise and support as members and benefit from their global reach and regional expertise.

We want to thank all IFIF Members for their strong support of IFIF's work, projects and mission.

IFIF is a membership driven organization and together with our Members we work to ensure the feed industry continues to be seen as an essential participant in the food chain that provides sustainable, safe, nutritious and affordable food for a growing world population.

IFIF Members

National and Regional Associations





安全飼料
安全食品
JFMA
Japan Feed Manufacturers Association



SFMCA
Stock Feed Manufacturers' Council of Australia



Corporate Members



Alltech
Nutrition, health, performance ...naturally



CALYSTA



Improving food & health



dsm-firmenich

EASTMAN



Nutrien



Feed Related Organisations



Who we are



What we do



Challenge





Partnerships

In 2022/23 IFIF strengthened its work with key international organisations along the feed and food chain, to support feed and food safety and fair trade, while meeting the increased demands of food sustainably.

[Click links for more info](#)

[CLOSE X](#)

[Food and Agriculture Organization of the UN \(FAO\)](#)

[International Organization for Standardization \(ISO\)](#)

[Codex Alimentarius](#)

[World Organisation for Animal Health \(WOAH\)](#)

[Partners across the Agri-Food chain](#)

OUR PILLARS





IFIF's partnership with the Food and Agriculture Organization of the United Nations (FAO)

In 2022 and 2023 IFIF and the Food and Agriculture Organization of the United Nations (FAO) continued to strengthen their collaborative relationship with a number of key strategic initiatives, including IFRM and Capacity Development for feed safety.

The IFIF FAO collaboration has become a prominent example of how the public and private sector can work together in a number of key areas, which positively impact the feed and food chain.

Already in 2005 the FAO and IFIF, recognising their common interest in promoting the safe supply of animal feed throughout the world, signed a formal Memorandum of Understanding (MOU), which continues to form the basis of collaboration between the two organisations.

One highlight of the IFIF and the FAO Animal Production and Health Division, are efforts to facilitate dialogue between the private and public sector on key issues affecting the feed and food chain. This includes the annual

International Feed Regulators Meeting (IFRM), which brings together feed regulators and industry from around the world, as well as the tri-annual Global Feed and Food Congress series, which includes representatives from the whole feed and food chain, as well as government, academia, other intergovernmental organizations and NGOs.

In 2020 IFIF FAO launched the fully updated “**Manual of Good Practices for the Feed Sector**”. This Manual was first published in 2010 and has been a valuable tool to increase knowledge and improve feed safety at the production level, and it is widely recognized and used in many countries around the world. This second publication is a fully revised, updated and expanded version of that Manual and addresses recent developments in feed production and benefits from the latest scientific and technical knowledge. It has been very well received and the new manual is already being translated into Chinese and Vietnamese.

A second key area of collaboration is capacity development in feed safety and spreading of good feed manufacturing practices. IFIF is a founding partner of the FAO-led **Feed Safety Multi-Stakeholder Partnership**, which was formally launched in April 2016 and aims at improving the safety of feed, and thus enhancing food safety, animal health and welfare and food security.



The Feed Safety Multi-Stakeholder Partnership is undertaking a number of initiatives to support feed safety:





As global compound feed production continues to expand, especially in the developing world, IFIF continues to work with the FAO on Capacity Development for Feed Safety, an important effort that will continue on in the next years.

The 2010 FAO/IFIF "Manual of Good Practices for the Feed Industry" has been published in English, Chinese, Arabic, French and Spanish and distributed widely to regulators and industry. IFIF is also engaged in the recent efforts by the FAO to develop the capacities of relevant stakeholders globally to ensure the production and supply of safe feed based on latest Codex standards and good practices.

The IFIF FAO collaboration has become a prominent example of how the public and private sector can work together in a number of key areas, which positively impact the feed and food chain. IFIF's relationship with the FAO continues to strengthen with IFIF's participation in the Global Agenda for Sustainable Livestock, as an official stakeholder in the Livestock Environmental Assessment and Performance (LEAP) Partnership and the FAO's Private Sector Initiative. IFIF will continue to be strongly engaged in these efforts.

**IFIF collaboration with Codex Alimentarius as a
Codex-recognized NGO**

>

IFIF official liaison status with the International Organization for Standardization (ISO)

In 2022 and 2023 IFIF has official liaison status with the International Organization for Standardization (ISO) Technical Committee ISO/TC34/SC10 to work on animal feeding stuffs.

The scope of this Technical Committee (TC) is 'Standardization in the field of animal feeding stuffs including: terminology, sampling, methods of test and analysis in quality control, specifications of raw material & finished product, guidelines and requirements for packaging, storage and transportation'.

In 2021 the TC worked its set up new Working Group (ISO/TC 34/SC 10/WG 13) to review the ISO 7088:1981 on Fish-meal – Vocabulary, under the Technical Programme ISO/TC 34/SC 10 on Animal feeding stuff.

You can find more details about this Committee here <https://www.iso.org/committee/47924.html> and about ISO here: <https://www.iso.org>.

IFIF engaged and supported the work of ISO/TC34/SC10 to ensure that it is aligned with other international initiatives related to animal feed terminology.



IFIF collaboration with Codex Alimentarius as a Codex-recognized NGO

As a Codex recognized NGO, IFIF follows and inputs into in the work of the relevant Codex Committees and participates in Codex Side Events addressing feed safety for safe food.

In 2022 and 2023 IFIF joined global regulators at the annual Sessions of the Codex Alimentarius Commission, where together with the FAO, we held a number of side meetings related to feed safety. Feed safety is relevant to Codex Alimentarius Commission work as it impacts on the safety of food.

IFIF has been actively involved in the development of the Codex Code of Practice of Good Animal Feeding and was an active member of the ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF).

As a Codex recognized NGO, IFIF follows and inputs into in the work of the relevant Committees and participates in Codex Side Events addressing feed safety for safe food.

In 2022 and 2023 IFIF joined global regulators at the annual Sessions of the Codex Alimentarius Commission (CAC) in 2022 and 2023, where together with the FAO, we kept feed safety on the agenda. IFIF was also actively involved in a number of important Codex electronic Working Groups, as well as active in the **Codex Committee on Contaminants in Foods (CCCCF)**, the **Codex Committee on Residues of Veterinary Drugs in Foods (CCVRDF)** and the **Codex Committee on Food Import and Export Inspection and Certification Systems (CCFICS)** and the **Codex Committee on Food Labelling (CCFL)**. We will continue to provide expert input into the various Codex WGs and Committees in the year ahead.

This work will continue into 2024 and supports IFIF’s on-going efforts to keep feed safety issues on the Codex agenda.

IFIF’s partnership with the Food and Agriculture Organization of the United Nations (FAO)	>
IFIF Cooperation Agreement World Organisation for Animal Health (WOAH)	>
IFIF official liaison status with the International Organization for Standardization (ISO)	>
Working with partners across the Agri-Food chain	>

IFIF Cooperation Agreement World Organisation for Animal Health (WOAH)

The WOAIF IFIF cooperation further aims to strengthen links between feed safety and food safety. IFIF works with the WOAIF to contribute to improved animal health and productivity, which in the end leads to a positive contribution to public health.

In 2022 and 2023 IFIF continued to strengthen its relationship with the World Organisation for Animal Health (WOAH) and input in the development, updating and implementation of WOAIF standards and guidelines to contribute to improved animal health and productivity.



IFIF joined the 90th and 91st WOAHA General Session, highlighting the cooperation between IFIF and WOAHA, in particular with regards to the prevention and management of infectious diseases, including zoonotic diseases, is vital and our cooperation should strengthen linkages between feed safety and food safety.

At the last face to face meeting in 2019, IFIF presented to the 900 delegates of the 87th General Session of the World Assembly of the WOAHA Delegates and confirmed its commitment to partnership with the WOAHA, underlined that animal nutrition is an important contributor to promote animal health and welfare, and underlined the feed industry's commitment to strong biosecurity measures under our control to ensure feed safety and integrity.

The WOAHA IFIF cooperation further aims to strengthen links between feed safety and food safety. IFIF works with the WOAHA to contribute to improved animal health and productivity, which in the end leads to a positive contribution to public health.

IFIF's partnership with the Food and Agriculture Organization of the United Nations (FAO) >

IFIF collaboration with Codex Alimentarius as a Codex-recognized NGO >

IFIF official liaison status with the International Organization for Standardization (ISO) >

Working with partners across the Agri-Food chain >

Working with partners across the Agri-Food chain

IFIF strongly believes all partners along the agri chain have to work together to ensure sustainable and safe feed and food in the future.

IFIF works closely with other chain partners with the objective to find a common voice to address the challenges and opportunities in the agri chain, including with the following organisations:

- HealthforAnimals
- International Dairy Federation (IDF)
- International Egg Commission (IEC)
- International Meat Secretariat (IMS)
- International Poultry Council (IPC)
- Global Dairy Platform (GDP)
- Roundtable for Sustainable Beef (RTSB)
- World Farmers Organization (WFO)
- World Renderers Organization (WRO)

In 2022 and 2023, IFIF worked on a number of strategic join initiatives with these partners, including coordinating input and efforts at the FAO-led LEAP Partnership, the Global Agenda for Sustainable Livestock (GASL), the UN Food Systems Summit (UN FSS) Process and the COAG Sub-Committee on Livestock.



International
Feed
Industry
Federation
Annual Report
2022/23



Our Pillars

To support our industry on the road to the future, in 2022/23 IFIF's work is focussed on three strategic pillars:

Sustainability
Regulatory & International Standards
Education & Best Practices

OUR THREE PILLARS





Our Three Pillars



Sustainability

IFIF supports and encourages the sustainable development of animal production.

[+ READ MORE](#)

PROJECTS

Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed LCA Institute (GFLI)

Partnership on Livestock Environmental Assessment and Performance (LEAP)

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Health and Welfare



Regulatory & International Standards

IFIF promotes a balanced regulatory framework to support a fair global playing field to facilitate market access and support the competitiveness of the feed & livestock industries.

[+ READ MORE](#)

PROJECTS

International Feed Regulators Meeting (IFRM)

International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF)

CODEX work relevant to animal feeding

Taxonomy Name Updates

Quadripartite AMR Partnership Platform



Education & Sharing of Best Practices

IFIF supports sharing of good practices, promotes science-based solutions for the feed industry and facilitates dialogue among key stakeholders.

[+ READ MORE](#)

PROJECTS

IFIF/FAO Feed Manual

IFIF Global Animal Nutrition Programme 'Train the Trainer'

The Feed Safety Multi-Stakeholder Partnership for Capacity Development for Feed Safety

Biosecurity Guidance for Feed Mills

Global Feed Statistics

NATIONAL AND REGIONAL UPDATES



Sustainability

One of the key parts of IFIF's mission is to continue to support and encourage the sustainable development of animal production.

One of the key Pillars underlying IFIF is working with its members to 'support sustainable animal production systems: produce more, using less and even better at an affordable cost to the consumer'.

The IFIF Sustainability Committee, made up of senior leaders and sustainability experts, has defined the following mission for IFIF in this important area:

Mission: IFIF fosters animal nutrition innovation and efficiency and supports and encourages the development and use of science-based global guidance to measure, benchmark and improve environmental performance and sustainability of animal production.

IFIF works with key stakeholders and partners to advance sustainable animal production systems. Animal nutrition is an essential part of the solution to make the livestock production chain more sustainable and IFIF strives to support the UN Sustainable Development Goals, including 'Zero Hunger', 'Good Health and Wellbeing', 'Responsible Consumption and Production' and 'Climate Action'.

IFIF with its Members undertakes & is involved in a number of initiatives across 3 Action Areas to support this vision & mission:

RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed Lifecycle Assessment (GFLI)

Partnership on Livestock Environmental Assessment and Performance (PLEAP)

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Welfare

- Action Area 1: Measure & Benchmark Feed Impact
- Action Area 2: Sustainability through Animal Nutrition
- Action Area 3: Driving Good Sustainability Practices



Over the last decades through innovation and efficiency, animal feed has proven to be an essential part of the solution to make the livestock production chain more sustainable.

IFIF's work with our members, as well as international organizations, such as FAO, as well as our agri-food chain partners to measure, benchmark and reduce the greenhouse gases (GHG) impact of livestock production globally.

In 2022 and 2023 these efforts continued strongly and IFIF provides leadership and expert input to FAO-led sustainability initiatives, including the Global Agenda for Sustainable Livestock and the Partnership on Livestock Environmental Assessment and Performance (LEAP).

Furthermore, IFIF has developed a number of strategic initiatives to measure and benchmark the environmental performance of the livestock production chain. IFIF is founding member of the Global Feed LCA Institute (GFLI), which used the FAO LEAP methodology to develop a golden global standard for assessing and benchmarking feed industry impact and improvement in LCA calculation, in order to support the reduction of the environmental footprint of livestock products.

IFIF has also together with the EU Association of Specialty Feed Ingredients and their Mixtures (FEFANA) and a consortium of international companies and associations, launched the Specialty Feed Ingredients Sustainability Project (SFIS), which measured and established the role of specialty feed ingredients (SFIs) on the environmental impact of livestock production.

Regulatory & International Standards



Education & Sharing of Best Practices



Sustainability

SUSTAINABILITY PROJECTS

CLOSE X

The Specialty Feed Ingredients Sustainability Project (SFIS)

The Specialty Feed Ingredients Sustainability (SFIS) project brings together a consortium of international companies and associations dedicated to reducing the environmental impact of livestock through innovative specialty feed ingredients.

SFIS Phase 3 (Completed)

In 2023, the SFIS project **phase 3** was finalised. This Phase 3 aimed to achieve a harmonized approach for the assessment of the use of SFIs in animal feeding on a cradle to farm gate approach. This includes the production of the SFIs from cradle to factory gate as well as the use on the farm and the further recycling or application of manure. Based on this approach, future LCAs for animal products should become transparent, reliable and thus, comparable.

The SFIS Phase 3 looked at Australia, US and Europe pigs and poultry and initial results have shown an improvement, mainly due to improved feed conversion rates.

In 2020 SFIS Phase 3 results underwent an expert scientific review. The results obtained have been reviewed by a Scientific Council and no changes in the value were requested and the project has reached the objectives. In 2021 a critical review was been completed and project partners aim to publish the

RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed LCA (GFLI)

Partnership on Life Cycle Environmental Assessment and Performance

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Welfare

results of the study in a peer-reviewed journal.

SFIS Phase 1 & 2 (Completed)

In the SFIS project **phase 1 and 2**, the project partners joined together to measure and establish the role of specialty feed ingredients (SFIs), specifically amino acids and enzymes, on the environmental impact of livestock production and are united in their goal to contribute to the reduction of emissions in the food and feed chain.

The overall results of the study **announced** on 5 February 2014 show that the use of these SFIs in animal diets reduces the consumption of basic feed ingredients. Furthermore the study demonstrates that the use of SFIs, such as amino acids and phytase, results in clear reductions of the Global Warming Potential, as well as the Eutrophication and Acidification Potential during livestock production.

You can download the overview and results of the study from Europe, North America and South America on the left side of this page or [here](#). The results have also been published in the peer reviewed *Journal of Animal Science* under the title 'Environmental impact of using specialty feed ingredients in swine and poultry production: A life cycle assessment' by Kebreab et al. 2016. You can download the paper [here](#).

Regulatory & International Standards

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Education & Sharing of Best Practices

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Sustainability

SUSTAINABILITY PROJECTS

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RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed LCA Institute (GFLI)

Partnership on Livestock Environmental Assessment and Performance

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Welfare

Global Feed LCA Institute (GFLI)

IFIF is a founding members of the Global Feed LCA Institute (GFLI), a feed industry initiative with the aim to develop a freely and publicly available feed LCA database and tool.

The GFLI database and LCA tool aim to support meaningful LCAs of livestock products using region specific data and enable our sector to benchmark feed industry environmental impacts on a level playing field.

The GFLI database and tool is based on the internationally recognized feed LCA methodology developed by the FAO-led Livestock Environmental Assessment and Performance (LEAP) Partnership.

In 2022 and 2023, following the launch of the LEAP guidelines on the environmental performance of feed additives in livestock supply chains, IFIF as part of its commitment to support the practical implementation of LEAP guidelines, has worked with FEFANA and the GFLI to develop a project to facilitate the implementation of these guidelines.

Environmental footprinting of livestock products is a challenging but essential task to improve the accuracy of reporting on the real impacts of livestock products. This includes both understanding where the livestock chain stands in in terms of impact and encouraging the benchmarking and measurement of both individual and collective reduction efforts.

The GFLI aims to bring the major feed producing regions together and develop the golden global standard for assessing and benchmarking feed industry impact and improvement in LCA calculations.

Feed is an important part of the agri-food chain and it is essential that feed operators are able to understand their impact, not only from a business efficiency perspective but also to meet the expectations of our customers and public bodies, at both at national and international level.

For more information about the GFLI please visit <http://globalfeedlca.org/>.

Regulatory & International Standards >

Education & Sharing of Best Practices >

Sustainability

SUSTAINABILITY PROJECTS

CLOSE X

Partnership on Livestock Environmental Assessment and Performance (LEAP)

Livestock raising and the consumption of animal products make a crucial contribution to the economic and nutritional wellbeing of millions of people around the world – particularly in developing countries. Yet the need to improve environmental performance of the livestock sector will continue as the FAO estimates that demand for livestock products will continue to intensify over the decades to come.

In 2022 and 2023, IFIF continued to support the FAO-led Partnership on Livestock Environmental Assessment and Performance (LEAP), which is working on comprehensive guidance and methodology for understanding the environmental performance of livestock supply chains.

LEAP aims at developing internationally agreed LCA methodologies for livestock to improve how the environmental impacts of the livestock industry are measured and assessed, an important step to reduce the impact of livestock products on the environment.

RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed LCA Institute (GFLI)

Partnership on Livestock Environmental Assessment and Performance (LEAP)

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Health and Welfare

Meat consumption is projected to rise nearly 73 percent by 2050; dairy consumption will grow 58 percent over current levels.

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In September 2020, LEAP published the guidelines on the environmental performance of feed additives in livestock supply chains, which follows the publication of the Global Feed LCA Guidelines methodology in April 2015 – these guidelines represented a significant achievement and milestone. This ground-breaking methodology introduced a harmonized, science-based, practical and international approach to the assessment of the environmental performance of feed supply chains, while taking into account the specificity of the diverse production systems that exist globally.

In 2021, following the launch of the LEAP guidelines on the environmental performance of feed additives in livestock supply chains, IFIF as part of its commitment to support the practical implementation of LEAP guidelines, has worked with FEFANA and the Global Feed LCA Institute (GFLI) to develop a project to facilitate the implementation of these guidelines.

In 2022 and 2023 IFIF worked to support LEAP+, both through work in the Steering Committee, as well as by providing IFIF experts to the LEAP Technical Advisory Groups (TAG) on Methane in 2022 and Circular Bio-Economy in 2022-2023. IFIF will continue to support this important initiative in 2024 as Leap Phase 4 moves into Phase 5.

History

In 2018 the LEAP Steering Committee agreed to establish a Technical Advisory Group (TAG) on Feed Additives. The TAG will developed technical guidance for the accounting of: (i) environmental impacts associated with the production of feed additives and (ii) environmental impacts of livestock systems using feed additives.

In 2018 and 2019 IFIF experts worked in the feed additives TAG of LEAP, whose important work was in large part based on the previous scientific work of the SFIS project.

The LEAP/FAO Feed LCA Guidelines reflect a common vision among partners, including the FAO, national governments, private sector organizations as well as NGOs. The Guidelines carry an international scientific consensus based on the input of twenty international experts in the drafting process and a

thorough international public review, which took place ahead of their official release.

The Guidelines represent a significant milestone for the global feed industry and will enable consistent and credible environmental assessments with a view to reduce the environmental footprint of livestock products.

Based on this IFIF will continue to work with partners on the agri-feed chain to develop practical tools for feed and livestock producers to assist them in further reducing the environmental footprint of their activities.

For more information about LEAP please visit:
<http://www.fao.org/partnerships/leap/en/>.

Regulatory & International Standards >

Education & Sharing of Best Practices >

Sustainability

SUSTAINABILITY PROJECTS

CLOSE X

Global Agenda for Sustainable Livestock (GASL)

Throughout 2022 and 2023 IFIF has been involved as a Member of the Guiding Group in the FAO-led Global Agenda for Sustainable Livestock. IFIF has signed the Global Agenda Consensus and actively inputs in the work of the Agenda, and has supported the development of the initiative since its start in 2010.

In 2022 and 2023 IFIF continued to support the work of the FAO-led **Global Agenda for Sustainable Livestock**. IFIF is a Member of the Guiding Group of the Global Agenda, has signed the Global Agenda Consensus and has supported the development of the initiative since its beginnings in 2010. IFIF attended the 12th and 13th Multi-Stakeholder Partnership meetings of the Global Agenda in 2022 and 2023.

The Agenda is a partnership of livestock sector stakeholders supported by the FAO and committed to the sustainable development of the sector. Together the partners develop and implement an ambitious Agenda to ensure that sector growth contributes to socially desirable objectives. The partnership brings together public and private sector, producers, research and academia, civil society, NGOs, and inter-governmental organizations to focus on three areas of work:

RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed Lifecycle (GFLI)

Partnership on Environmental and Performance

Global Agenda for Sustainable Livestock (GASL)

Nutritional Innovation to promote Animal Welfare

The Agenda builds consensus on the path towards sustainability and catalyses coherent and collective practice change through dialogue, consultation and joint analysis.



The partnership unites the forces of the public and private sectors, producers, research and academic institutions, NGOs, social movements and community-based organizations, and foundations.

The Global Agenda work to support the UN Sustainable Development Goals as part of the UN 2030 Agenda for Sustainable Development and the important contribution of livestock to the, including:

- the vital role of livestock to end poverty and hunger, and to improve food security, nutrition and health;
- the potential contribution of livestock to the sustainable use of terrestrial ecosystems, to address environmental degradation and climate change, and to improve biodiversity;
- the role of the livestock sector in promoting peaceful and inclusive societies;

It simultaneously addresses the following issues:

- **Global food security and health:** The sector is critical to human health and global food and nutritional security. The Agenda promotes an inclusive approach to managing disease threats at the animal-human-environment interface that involves all sector stakeholders at every level in the development and implementation of animal-disease and food-safety programmes.
- **Equity and growth:** Livestock is essential to the livelihoods of an estimated one billion poor. The Agenda supports a viable growth in value chains that have access to all necessary resources and services, and in which the poor can find secure livelihoods and participate in growing markets or take up other opportunities outside the sector.
- **Resources and climate:** Livestock production based mainly on materials not competing with direct use as human food, and incentives and rewards for environmental stewardship will allow the sector to transition to existing and new resource use efficient ways of production and a greater contribution to climate change mitigation.

For more information about the Global Agenda please visit:

<http://www.livestockdialogue.org/>.

Sustainability

SUSTAINABILITY PROJECTS

[CLOSE X](#)

Nutritional Innovation to promote Animal Health and Welfare

The IFIF work on nutritional innovation aims to support the industry in demonstrating how animal nutrition is an important contributor to promote animal health and welfare.

Animal Nutrition is an important part of the solution to help to contain Antimicrobial Resistance (AMR). The feed sector plays a critical role in supporting animals' optimal health with high resilience capabilities to stressors through safe and high-quality feed (feed formulation and processing) and access to nutritional innovation. It therefore is a key factor in the wellbeing of all livestock, fish and companion animals.

Adequate animal nutrition (defined as the provision of well-balanced and well formulated feed) combined with good hygiene practices on farms and proper housing are key in promoting animal health and welfare. A balanced diet of compound feed supported by specialty feed ingredients meets the animal's physiological requirements and maintains the balance of the gut flora. Gut health is in fact a key factor in keeping animals healthy and resilient to stressors, such as heat or pathogens.

In 2022 and 2023 the important work by the IFIF working group on Nutritional Innovation continued at pace, and among other things the work has already

RELATED PROJECTS

The Specialty Feed Ingredients Sustainability Project (SFIS)

Global Feed Lifecycle Initiative (GFLI)

Partnership on Environmental, Social and Governance (ESG) and Performance

Global Agenda for Sustainable Livestock Production (GASL)

Nutritional Innovation to promote Animal Health and Welfare

highlighted how the feed sector plays a critical role in supporting animals' optimal health with high resilience capabilities to stressors through safe and high-quality feed (feed formulation and processing) and access to nutritional innovation.

The IFIF Nutritional Innovation work covered the following three pillars:

- **Scientific pillar:** Development of scientific standards to ensure that nutritional innovations are assessed using science-based criteria.
- **Communication pillar:** Awareness raising to explain and clarify the role of adequate nutrition in sustainable livestock production system, by maintaining animals in good health and well-being.
- **Regulatory pillar:** Regulatory approaches to properly consider the role of adequate nutrition, improving market access and acceptance.

After developing the paper on "Definitions in the context of adequate nutrition to support resilience of animal to stressors", adopted by the IFIF Board of Directors in July 2020, the Working Group appointed a Scientific Expert Panel (experts in the field of nutrition, microbiology, and microbiome) to develop the scientific basis for evaluating the effectiveness of nutritional solutions for animal health and well-being. During its first phase of work, the Scientific Expert Panel has supported the working group in prioritizing relevant endpoints, supported by literature, with the objective to develop guidelines for the evaluation of the effectiveness of nutritional solutions, to be shared and discussed with authorities, for facilitating marketing of nutritional solutions (substantiation of claims).

Regulatory & International Standards



Education & Sharing of Best Practices





Regulatory & International Standards

One key part of IFIF's mission is to promote a balanced regulatory framework to support a fair global playing field to facilitate market access and support the competitiveness of the feed and livestock industries.

IFIF's work aims to support worldwide trade and ensure that future demands for feed and food can be met efficiently and these efforts continues in 2022 and 2023.

Engagement with international institutions is vital for this and IFIF collaborates with the FAO, the World Organisation for Animal Health (OIE), the Codex Alimentarius Commission, and other international bodies to help set international regulatory standards for the whole feed chain and support fair trade.

IFIF has a strong collaborative relationship with the FAO dating back many years, and IFIF and the FAO Animal Production and Health Division organize the annual International Feed Regulatory Meeting (IFRM). The IFRM continues as a successful joint effort to bring together government officers, intergovernmental organizations, academia and feed and food companies and organizations from around the world to discuss key issues of relevance, including mutual recognition and global feed safety standards.

IFIF together with regulatory authorities and feed and feed ingredient associations from Canada, the European Union and the United States launched the International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF). This important

RELATED PROJECTS

International Feed
Regulators Meet

International Co
operation for Convergence
of Technical Require
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of Feed Ingredients (ICCF)

CODEX work rele
ated to animal feeding

Taxonomy Name

Quadripartite AN
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IFIF together with regulatory authorities and feed and feed ingredient associations from Canada, the European Union and the United States launched the International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF). This important international cooperation aims to develop and establish common guidance that covers technical requirements for the assessment of feed ingredients, including new uses of existing feed ingredients.

As animal health is also a vital component of the feed chain, IFIF holds a cooperation agreement with the World Organisation for Animal Health (WOAH). The two organizations work together with the regards to the prevention and management of infectious diseases, including zoonotic disease, as well as the support for the development, updating and implementation of OIE standards and guidelines.

Finally, feed safety is relevant to Codex Alimentarius work as it impacts on the safety of food. IFIF is a Codex Alimentarius recognized NGO and was actively involved in the development of the Codex Code of Practice of Good Animal Feeding, as well as a member of the ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF).

Codex work on animal feed continues in individual Committees (within their mandate) and the participation of IFIF feed experts in Codex work contributes to keep feed safety on Codex agenda.

Sustainability

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Education & Sharing of Best Practices

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Regulatory & International Standards

REGULATORY & INTERNATIONAL STANDARDS PROJECTS

CLOSE X

International Feed Regulators Meeting (IFRM)

The annual International Feed Regulators Meeting (IFRM) organized by IFIF in cooperation with the FAO provides an opportunity for regulators and feed industry professionals from across the globe to exchange their thoughts and discuss concrete ideas for providing safe feed and food in a sustainable manner around the world.

RELATED PROJECTS

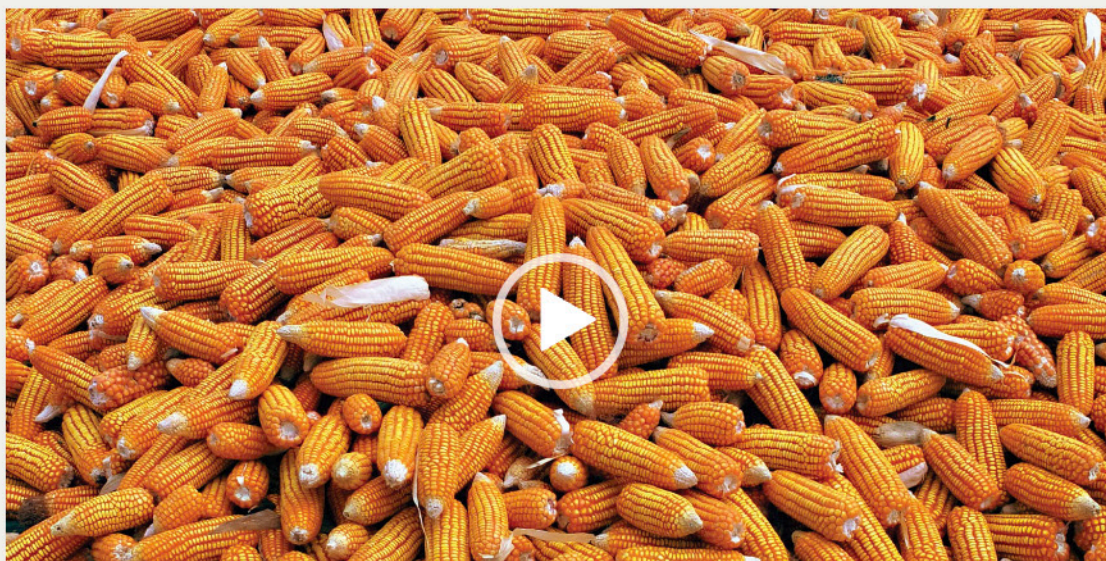
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16th International Feed Regulators Meeting (IFRM)

The 16th annual International Feed Regulators Meeting (IFRM) organized by the International Feed Industry Federation (IFIF) and the Food and Agriculture Organization of the United Nations (FAO) brought together feed industry representatives and government officials from around the world to discuss critical issues facing the feed sector with IFIF and the FAO in Atlanta, USA in January 2023.



Participants from across the world and from key regulatory bodies joined the 16th IFRM. The meeting, yet again, proved to be an important opportunity for the global feed industry and feed regulators to discuss key issues for the feed and food chains, including important work on nutritional innovation strategies to improve animal health and welfare, an update of Codex Alimentarius work with relevance to feed, as well as a very timely workshop on emerging feed sources and technologies in a circular bio-economy context.





Other topics discussed at the 16th IFRM included a panel on the successful work of the International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF), which aims towards convergence of technical requirements specific to feed additive/ingredient authorization across regions, as well as presentations on key feed issues in Thailand and Vietnam.

15th International Feed Regulators Meeting (IFRM)

The 15th International Feed Regulators Meeting (IFRM), organized jointly by the Food and Agriculture Organization of the United Nations (FAO) and the International Feed Industry Federation (IFIF), took place virtually in 2022 as a result of the COVID-19 Pandemic and was held via online conference on 24-25 March 2022.

For more information about the IFRM please click [here](#).

Sustainability



Education & Sharing of Best Practices



Regulatory & International Standards

REGULATORY & INTERNATIONAL STANDARDS PROJECTS

CLOSE X

International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF)

IFIF together with regulatory authorities and feed and feed ingredient associations from Canada, the European Union and the United States launched the **International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF)**.

This important international cooperation aims to develop and establish common guidance that covers technical requirements for the assessment of feed ingredients, including new uses of existing feed ingredients.

The founding members of the ICCF include the Canadian Food Inspection Agency (CFIA), the European Commission (DG SANTE), the U.S. Food and Drug Administration (FDA), as well as the American Feed Industry Association (AFIA), the Animal Nutrition Association of Canada (ANAC), the EU Association of Specialty Feed Ingredients and their Mixtures (FEFANA) and the International Feed Industry Federation (IFIF).

In 2022 and 2023, the ICCF worked on and published two more guidance documents, bringing the total to seven:

RELATED PROJECTS

International Feed Regulators Meeting

International Cooperation for Convergence of Technical Requirements for the Assessment of Feed Ingredients (ICCF)

CODEX work related to animal feeding

Taxonomy Name

Quadripartite Animal Partnership Platform

1. **Stability Testing of Feed Ingredients** – March 2019
2. **Sub-chronic Oral Toxicity Testing in Laboratory Animals**– March 2019
3. **Homogeneity Testing of Feed Ingredients** – September 2020
4. **Manufacturing Process and Specification** – June 2021
5. **Genotoxicity Testing of Feed Ingredients** – April 2021
6. **Feed Ingredients Environmental Risk Assessment Approach** – Sep. 2023
7. **Identification and Characterization of Feed Ingredients** – Sept. 2023

The ICCF is the result of a concerted effort to bring together feed regulators and industry feed associations to work together to develop common guidance documents for technical requirements needed in the assessment of feed ingredients. This will benefit not only the three regions covered, as the guidance documents will be made available for reference and use by other jurisdictions around the globe.

The ICCF should help to facilitate free and fair trade of feed ingredients as well as support the feed and food chain as it works to safely and sustainably meet the global growing demand for animal protein.

The ICCF Steering Committee, made up of representatives from the founding members of the ICCF, is responsible for defining the priorities and activities of the project and establishing and overseeing the Expert Working Groups, which will be tasked with developing specific technical guidance documents. As this initiative develops, observer countries will be invited to join the expert groups and may be invited as non-voting members to the ICCF Steering Committee on an ad-hoc basis.

The ICCF builds on the work of the 2013 IFIF “**Comparison of Regulatory Management of Authorized Ingredients, Approval Processes, and Risk-Assessment Procedures for Feed Ingredients**” report, which covered synergies and gaps for product approvals in Brazil, Canada, China, EU, Japan, South Africa and USA. This report was drafted based on expert input and supported by government feed regulators and feed and feed ingredients associations in the seven regions covered.

For further information about the ICCF please visit: <https://iccffeed.org>

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CODEX work relevant to animal feeding

IFIF is a Codex Alimentarius recognized NGO and has been actively involved in the development of the Codex Code of Practice of Good Animal Feeding and was an active member of the ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF).

In 2022 and 2023 IFIF joined global regulators at the annual Sessions of the Codex Alimentarius Commission (CAC), where together with the FAO, we kept feed safety on the agenda.

IFIF is engaged to keep feed safety issues on the Codex agenda and together with the FAO, IFIF participates and organizes side events on feed safety in conjunction with Codex meetings.

As an official Codex Observer organization, IFIF was also actively involved in a number of important Codex electronic Working Groups, as well as active in the **Codex Committee on Contaminants in Foods (CCCCF)**, the **Codex Committee on Residues of Veterinary Drugs in Foods (CCVRDF)** and the **Codex Committee on Food Import and Export Inspection and Certification**

Codex Committee on Food Import and Export Inspection and Certification Systems (CCFICS) and the Codex Committee on Food Labelling (CCFL).

This work will continue into 2024 and supports IFIF’s on-going efforts to keep feed safety issues on the Codex agenda.

In the past, IFIF has been actively involved in the development of the Codex Code of Practice of Good Animal Feeding and was an active member of the ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF).

As a Codex recognized NGO, IFIF follows and inputs into in the work of the relevant Committees and participates in Codex Side Events addressing Feed Safety.

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Taxonomy Name Updates

IFIF identified challenges facing the global feed industry from **'taxonomy name updates'**.

In 2022 and 2023, an IFIF working 'Group on Taxonomy Name Update' worked to identify challenges facing the global feed industry from "taxonomy updates" including label inconsistencies, confusion in the market and difficulty importing into certain countries. IFIF is raising awareness with regulatory bodies around the world and urging cooperation between the regulators and industry to establish suitable procedures to update the nomenclature of microorganisms that works for both industry and regulators.

The global feed industry is challenged with the rapid scientific advancement in the taxonomic classification of microorganisms that is continuously leading to changes on the genus and species level. Whenever the scientific bodies update the taxonomic classification of a microorganism at the genus or species level, it impacts the name of the microorganism and as a consequence, the animal feed industry.

Taxonomic reclassifications like these do not change the safety nor the efficacy of the microorganisms, under their current conditions of use. They are a name change only.

The feed industry is heavily regulated across the globe and jurisdictions have different perceptions of updates caused by taxonomic reclassification and are

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utilizing different approaches on how to make the necessary updates leading to potential disruption in the international marketplace.

For further information please visit: <https://ifif.org/our-work/project/taxonomy-name-updates/>.

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Quadripartite AMR Partnership Platform

In 2022 IFIF joined the AMR Multi-Stakeholder Partnership

In 2022, IFIF was invited to join the AMR Multi-Stakeholder Partnership as part of the private sector cluster. The Partnership Platform was launched on 18 November 2022, during World Antimicrobial Awareness Week, and marked an important step towards more coordination, communication, and collaboration among a wide range of stakeholders globally to address AMR.

IFIF brings the science-based work on nutritional innovation into the Partnership. The IFIF nutritional Innovation work demonstrates animal nutrition is an important contributor to promote animal health and welfare. Animal Nutrition is an important part of the solution to help to contain Antimicrobial Resistance (AMR). The feed sector plays a critical role in supporting animals' optimal health with high resilience capabilities to stressors through safe and high-quality feed (feed formulation and processing) and access to nutritional innovation. It therefore is a key factor in the wellbeing of all livestock, fish and companion animals.

Adequate animal nutrition (defined as the provision of well-balanced and well formulated feed) combined with good hygiene practices on farms and proper housing are key in promoting animal health and welfare. A balanced diet of compound feed supported by specialty feed ingredients meets the animal's physiological requirements and maintains the balance of the gut flora. Gut health is in fact a key factor in keeping animals healthy and resilient to

stressors, such as heat or pathogens.

About the Partnership

The Food and Agriculture Organization of the United Nations (FAO), the [World Organisation for Animal Health \(OIE\)](#), and the [World Health Organization \(WHO\)](#) have been working together for decades to address risks at the human, animal, plant, and environment interface. Since 2018, the three agencies joined forces as a Tripartite to strengthen their long-standing partnership, with a renewed focus on tackling antimicrobial resistance (AMR) from a One Health approach.

The engagement of the [United Nations Environment Programme \(UNEP\)](#) in this work is also essential to support governments, civil society, and the private sector in addressing AMR risks related to the environmental sector. In 2022, the Tripartite became formally the Quadripartite as it welcomed UNEP in the alliance to accelerate coordinated strategy on human, animal and ecosystem health.

To advance a One Health response to AMR, the AMR Quadripartite Joint Secretariat (QJS) was established with liaison officers based in FAO, OIE, UNEP and WHO. Its role is to coordinate and support the Quadripartite and collaborate with other United Nations agencies and stakeholders.

The Quadripartite's goal is to preserve antimicrobial efficacy and ensure sustainable and equitable access to antimicrobials for responsible and prudent use in human, animal and plant health, contributing to achieving the Sustainable Development Goals (SDGs) and implementing further the Global Action Plan on AMR (GAP). To achieve this goal, the objectives are:

- To optimize the production and use of antimicrobials along the whole life cycle from research and development to disposal; and
- To decrease the incidence of infection in humans, animals, and plants to reduce the development and spread of AMR.

For more information visit: <https://www.fao.org/antimicrobial-resistance/quadripartite/the-platform/en/>

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Education & Sharing of Best Practices

IFIF supports sharing of good practices, promotes science-based solutions for the feed industry and facilitates dialogue among key stakeholders.

In 2022 and 2023 IFIF continued to promote and use the IFIF FAO launched the fully updated "Manual of Good Practices for the Feed Sector" launched in 2020. This Manual was first published in 2010 and has been a valuable tool to increase knowledge and improve feed safety at the production level, and it is widely recognized and used in many countries around the world. This second publication is a fully revised, updated and expanded version of that Manual and addresses recent developments in feed production and benefits from the latest scientific and technical knowledge. It has been very well received and the new manual is already being translated into Chinese and Vietnamese.

In 2023, IFIF translated the IFIF e-learning course 'Good Production Practices in the Feed Industry', into Spanish language. The course is an online training programme based on the updated IFIF FAO Feed Manual of Good Practices for the Feed Sector, which focuses on increasing safety and feed quality at the production level and which has reached over 500 participants in over 60 countries. IFIF partnered with the e-learning training platform Anpro Campus to develop this e-learning course to further expand the scope of the successful IFIF Global Animal Nutrition feed safety training programme 'Train the Trainer'.

Participants who successfully complete the 10 online modules and pass a final exam will receive a certificate, as well as have the opportunity to participate in a live virtual classroom with an IFIF expert trainer at the end.

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The IFIF course can be accessed at the following link:
<https://www.anprocampus.com/ttpages/info/?id=43>.

The IFIF feed safety trainings use the IFIF FAO 'Feed Manual of Good Practices' for the Feed Industry based on the Codex Code of Practice on Good Animal Feeding as a basis for the training materials. Supported by the Standards and Trade and Development Facility (STDF) of the World Trade Organization (WTO), the feed manual is available in Arabic, Chinese, English, French and Spanish.

IFIF is a founding partner of the FAO-led Feed Safety Multi-Stakeholder Partnership, which was formally launched in 2018 and aims at improving the safety of feed, and thus enhancing food safety, animal health and welfare and food security.

In 2023 IFIF formed a Working Group on 'Biosecurity Guidance for Feed Mills' with the aim to develop an IFIF Biosecurity Manual based on existing national papers on biosecurity measures from our IFIF regional and national associations as a basis.

In 2022 IFIF was invited to join the FAO-led AMR Multi-Stakeholder Partnership as part of the private sector cluster. The Partnership Platform was launched 18 November 2022, during World Antimicrobial Awareness Week, and marked an important step towards more coordination, communication, and collaboration among a wide range of stakeholders globally to address AMR.

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IFIF/FAO Feed Manual

In 2023 the IFIF FAO Manual 'Good Practices for the Feed Sector' was translated into Chinese and Vietnamese.

In 2023 the new IFIF FAO Manual 'Good Practices for the Feed Sector: Implementing the Codex Alimentarius Code of Practice on Good Animal Feeding' to increase safety and feed quality at the production level was translated into Chinese and Vietnamese.

In 2020 FAO and IFIF published the updated version of this Manual, first published in 2010, which has been a valuable tool to increase knowledge and improve feed safety at the production level, and it is widely recognized and used in many countries around the world. The second publication in 2020, the 'Manual of Good Practices for the Feed Sector: Implementing the Codex Alimentarius Code of Practice on Good Animal Feeding' is a fully revised, updated and expanded version of that Manual and addresses recent developments in feed production and benefits from the latest scientific and technical knowledge.

In February 2021, the FAO Sustainable Livestock Technical Network, the Animal Production and Health Division and IFIF held a webinar about the newly launched manual [Good Practices for the Feed Sector](#) and why feed safety is a key element in the sustainable production of food of animal origin and a necessity for food safety and animal health and welfare.

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This manual provides updated comprehensive information and practical guidelines to assist producers and all stakeholders along the production and distribution chain to comply with the regulatory framework, which have or will come into force in response to the Codex Alimentarius Code of Practice on Good Animal Feeding.

The application of this Code is an important step for the expansion of international trade in feed products as well as in products of animal origin. Both food exporting and importing countries can benefit from a more level playing field to support the trade of safe food products.

The Manual is a very relevant document to help support better standards, particular in developing economies and some results from the 2010 published Manual include:

- 'Feed Manual of Good Practices for the Feed Industry' shared with regulators and industry globally as a key resource to increase the safety of feed (and food) production. The Manual is available in Arabic, Chinese, English, French and Spanish.
- IFIF-led workshops and training reached feed producers and feed industries worldwide, including: over 30 trainers in Nigeria, 60 feed millers in Tanzania, and government officials from 10 countries in Latin America. Workshops have also been carried out in Nigeria, Egypt, India and Brazil.
- Setting up the Southern African Feed Manufacturers' Association to help harmonize legislation and regulations, boosting trade among countries and creating a self-regulating regional industry.
- Catalyzing the FAO-led Feed Safety Multi-Stakeholder Partnership to promote and support global capacity development.

The Feed Manual is meant to increase safety and feed quality at the production level both for industrial production and on farm mixing with a particular focus on the developing world.

Thanks to the project support, feed safety, and, as a result, food safety, continues to improve worldwide:

- Feed regulators and industry in developing countries regularly use the Feed Manual as a reference for updating and comparing legislation and regulations. Across Africa, Asia and Latin America governments and companies have made changes to meet the Codex Code of Practice on Good Animal Feeding.
- The Manual is being used to train industry and raise awareness among policy makers and producers. It is also being used as a teaching tool in universities, receiving positive feedback from students.

The production and publication of the Feed Manual was made possible by a grant from the Standards and Trade Development Facility (STDF), a global partnership that supports developing countries in building their capacity to implement international sanitary and phytosanitary (SPS) standards, guidelines and recommendations as a means to improve their human, animal and plant health status and ability to gain or maintain access to markets.

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IFIF Global Animal Nutrition Programme 'Train the Trainer'

IFIF launched the Global Animal Nutrition Programme 'Train the Trainer' to develop and train the capacities of the relevant compound feed production stakeholders in a developing region using the FAO/IFIF Manual of Good Practices for the Feed Sector based on the Codex Code of Practice on Good Animal Feeding.

Capacity Development for feed safety is one of the key priorities of IFIF under our strategic Pillar III: Education & Best Practices and links closely to FAO initiatives in this area.

IFIF launched the **Global Animal Nutrition Programme 'Train the Trainer'** to develop and train the capacities of the relevant compound feed production stakeholders in a developing region using the FAO/IFIF Manual of Good Practices for the Feed Sector based on the Codex Code of Practice on Good Animal Feeding.

In 2023, IFIF launched the Spanish version of the IFIF **e-learning course 'Good Production Practices in the Feed Industry'**. The e-learning course is aimed at stakeholders working in the feed chain and is available at no cost for government officials working in fields related to feed production as well as qualifying stakeholders and feed millers in emerging markets.

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Participants who successfully complete the 10 online modules and pass a final exam will receive a certificate, as well as have the opportunity to participate in a live virtual classroom with an IFIF expert trainer at the end. The IFIF course can be accessed at the following link:

<https://www.anprocampus.com/ttpages/info/?id=43>.

History of IFIF Capacity Development Trainings



Ghana Feed Safety Training – July 2018

Held in Accra in July 2018 and supported by the Ghana Ministry of Food and Agriculture (MoFA), the training programme based on the IFIF FAO Feed Manual of Good Practices for the Feed Industry focussed on increasing safety and feed quality at the production level. Over 30 national and regional feed officials and feed mill representatives participated in the training and they will act as multipliers by sharing the training with colleagues throughout Ghana.



Dr. Abdul Razak Okine, Deputy Director at the Animal Production Directorate of the Ministry of Food and Agriculture (MoFA), said, "the Ghana feed industry is diverse and we are committed to continue working with stakeholders in the industry towards achieving good practice benchmarks for animal feed safety and human food safety."

Through the IFIF training programme our livestock officers/feed officials and feed millers are better able to understand the FAO/IFIF Code of Practice for Good Animal Feeding and other Codex standards, including hazards associated with animal feed, good production practices, cross contamination, and sampling and analysis. Dr. Okine expressed the country's gratitude for the selection of Ghana as a beneficiary of the IFIF ToT programme.

Developed by IFIF in 2015, the Global Animal Nutrition Programme is designed to raise capacities for feed safety in developing regions by training key individuals who can then apply and share their new skills with colleagues on site within a country. This reflects IFIF's mission to promote solutions and information sharing for the feed industry, as well as stimulate the adoption of international standards and global equivalency.

Already in 2010, IFIF together with the FAO published the [Feed Manual of Good Practices for the Feed Industry](#), in order to support the spreading of good manufacturing practice and higher feed safety standards around the globe. The publication of the Feed Manual is intended to increase safety and feed quality at the production level both for industrial production and on farm mixing with a particular focus on the developing world.

The IFIF Training Programme focuses on the Implementation of IFIF/FAO Manual on Good Practices for the Feed Industry. Each training programme is tailor made to take into account local needs, and includes the following elements:

- Health hazards associated with animal feed
- Good Production Practices – Pre Requisite Programs
- HACCP
- On farm production and use of feed and feed ingredients
- Cross contamination
- Sampling and analysis

Tanzania Feed Safety Training

Held in Dar es Salaam in July 2017 and supported by the U.S. Grains Council and the Tanzanian Feed Industry Association (TAFMA), the **IFIF training programme in Tanzania** focussed on increasing safety and feed quality at the production level by training over 60 representatives from the Tanzanian feed industries. The IFIF training had real impacts for participants who can apply their new feed safety skills in feed mills across Tanzania and I congratulate all the participants for their dedication to increase feed safety and quality at the production level.



Sufian Z. Kyarua, Secretary general of TAFMA, said "the Tanzania feed industry is diverse and we are committed to continue working with our members towards achieving international benchmarks for animal feed safety and human food safety. Through the IFIF training programme our feed millers are better able to understand and implement the FAO/IFIF Code of Practice for Good Animal Feeding and other Codex standards, including hazards associated with animal feed, good production practices, cross contamination, and sampling and analysis."

Nigeria Feed Safety Training

Held in October 2015, the [IFIF training event in Lagos](#) supported by the Nigerian Institute of Animal Science (NIAS) brought together over 30 representatives from the Nigerian feed industries, who will act as multipliers by sharing the training with colleagues throughout Nigeria.



Dr. Godwin Oyediji, Registrar and Chief Executive of the Nigerian Institute of Animal Science (NIAS), said, "current laws in Nigeria are still weak and some are without enforcement powers. But Nigeria is making steady progress on feed legislation to achieve international benchmarks for animal feed safety and human food safety." Dr. Oyediji added "the industry is being mobilised to embrace the FAO/IFIF Code of Practice for Good Animal Feeding and other Codex standards on traceability, contaminants and HACCP."

The objectives of the Pilot Project in Nigeria were to:

- Extend capacity building to those countries and industries that lack knowledge and feed safety tools;
- Secure feed safety growth to governments and independent companies;
- Introduce systems and structures that are required to comply with international feed safety practices;
- Increase the quality and safety of feed for domestic consumption and international trade.

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Feed Safety Multi-Stakeholder Partnership

IFIF is a founding partner of the FAO-led Feed Safety Multi-Stakeholder Partnership, which aims at improving the safety of feed, and thus enhancing food safety, animal health and welfare and food security.

The Feed Safety Multi-Stakeholder Partnership continued its work in 2022 and 2023 to support feed safety:

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Food and Agriculture Organization
of the United Nations



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As global compound feed production continues to expand, especially in the developing world, IFIF continues to work with the FAO on Capacity Development for Feed Safety, an important effort that will continue on in the next years.

The Feed Safety Multi-Stakeholder Partnership is a FAO-led Partnership for Capacity Development for Feed Safety, with the objective to strengthen the capacity of relevant stakeholders along the feed and food value chain to produce and supply safer feed – thereby contributing to animal health and welfare and enhancing food safety and food security.

The Partnership addresses feed safety in the feed and food continuum that includes feed ingredients, feed inputs, feeding practices, feed handling, packaging, transportation, storage and manufacture. Activities of the Partnership will be relevant to all major feed and livestock products and related supply chains. Some activities will benefit stakeholders globally, while others will address more localized feed safety issues. The primary beneficiaries will be producers and policy-makers in feed and livestock producing countries. Producers will benefit through the development of capacities to address feed safety issues.

In particular the Partnerships' purpose is to:

- strengthen and develop technical and functional capacities of producers, policy makers and other operators along the supply and production chain;
- share best practices and risk-based measures for preventing and controlling hazards in feed;

The Partnership addresses feed safety in the feed and food continuum that includes feed ingredients, feed inputs, feeding practices, feed handling, packaging, transportation, storage and manufacture. Activities of the Partnership will be relevant to all major feed and livestock products and related supply chains. Some activities will benefit stakeholders globally, while others will address more localized feed safety issues. The primary beneficiaries will be producers and policy-makers in feed and livestock producing countries. Producers will benefit through the development of capacities to address feed safety issues.

In particular the Partnerships' purpose is to:

- strengthen and develop technical and functional capacities of producers, policy makers and other operators along the supply and production chain;
- share best practices and risk-based measures for preventing and controlling hazards in feed;
- support smallholders in reducing health risks for their animals and in reducing feed and food losses; and
- create and share scientific knowledge on new feed and technologies.

All activities implemented in the Feed Safety Multi-Stakeholder Partnership will follow a capacity development approach. Capacity development addresses different dimensions: i) individual; ii) organizational; and iii) the enabling environment. It considers social, economic and policy aspects, together with technical ones, and provides stakeholders and countries a leading role to ensure the sustainability of activities.

For more information please visit: <http://www.fao.org/feed-safety/background/feed-safety-multi-stakeholder-partnership/en/>.

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Biosecurity Guidance for Feed Mills

In 2023 IFIF formed a Working Group on 'Biosecurity Guidance for Feed Mills' and drafted a guidance document.

In 2023 IFIF formed a Working Group on 'Biosecurity Guidance for Feed Mills', which develop a draft Biosecurity Manual based on existing national papers on biosecurity measures from IFIF regional and national associations as a basis.

At the end of 2023, the WG completed their task and IFIF will work together with the FAO in 2024 to publish this important document.

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Global Feed Statistics

In 2023 world compound feed production exceeded an estimated one billion tonnes annually. Global commercial feed manufacturing generates an estimated annual turnover of over US \$400 billion.

The last years have continued to see an increase in the demand for animal protein worldwide, including for livestock, dairy and fish. Generally we have seen a growth of production particularly in the developing world, with the developed world remaining more or less stable.

Today world compound feed production is estimated to be over 1,2 billion tonnes annually. Global commercial feed manufacturing generates an estimated annual turnover of over US \$400 billion.

The United Nations Food and Agriculture Organization (FAO) estimates that by 2050 the demand for food will grow by 60% and that between 2010 and 2050 production of animal proteins is expected to grow by around 1.7% per year, with meat production projected to rise by nearly 70%, aquaculture by 90% and dairy by 55%. This already marks a growth factor of almost two, however if we were to extrapolate the growth rates of the last forty years forward to 2050, this would in theory quadruple the needs.

Below you will find a selection of data for production of feed as well as livestock globally. These are estimates only and are meant to demonstrate

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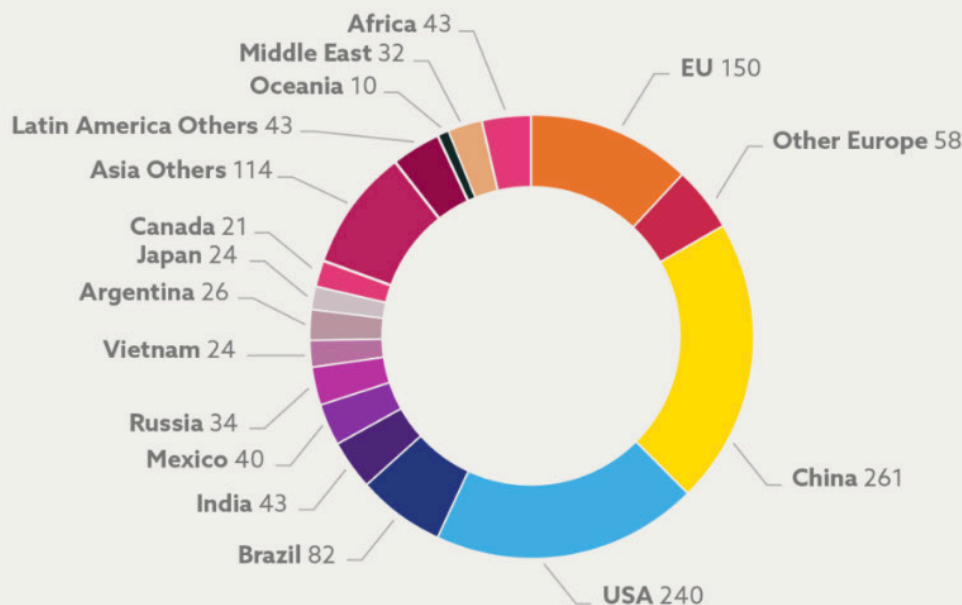
[IFIF/FAO Feed Ma](#)[IFIF Global Animal Programme 'Train Trainer'](#)[Feed Safety Multi-Stakeholder Partn](#)[Biosecurity Guidan Feed Mills](#)[Global Feed Statis](#)

global trends. For specific country and regional information please see the national and regional updates section of this annual report.

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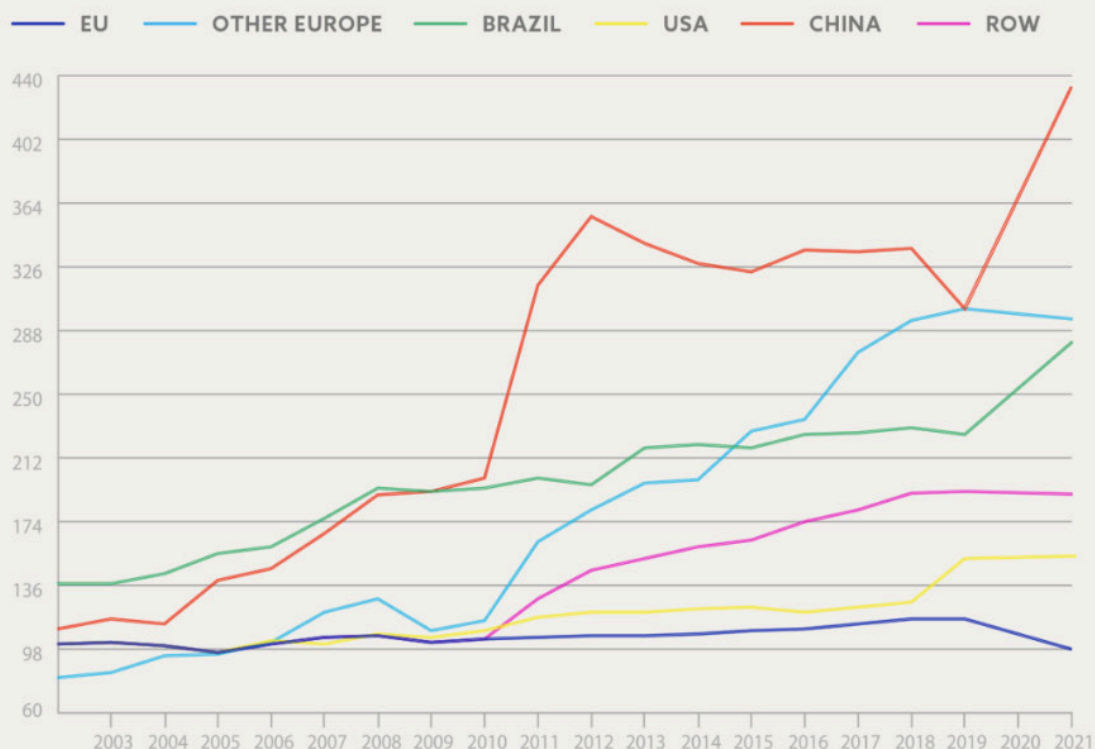
2022 GLOBAL ANIMAL FEED PRODUCTION (1245 MT.)

GLOBAL COMPOUND FEED PRODUCTION 2022 (MIO. T)

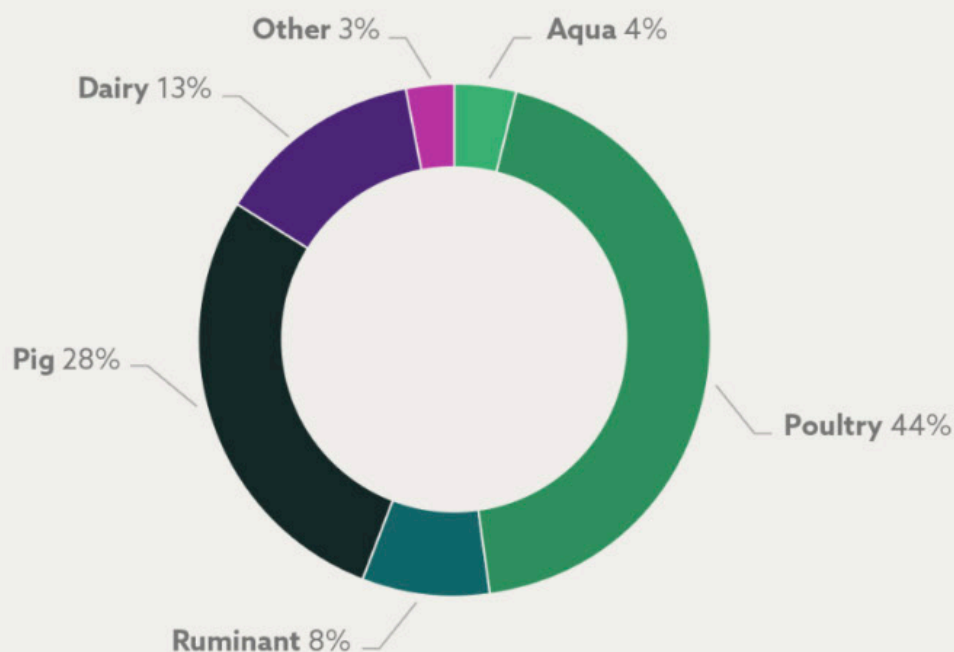


Source: FEAC / IFIF Regional and National Associations

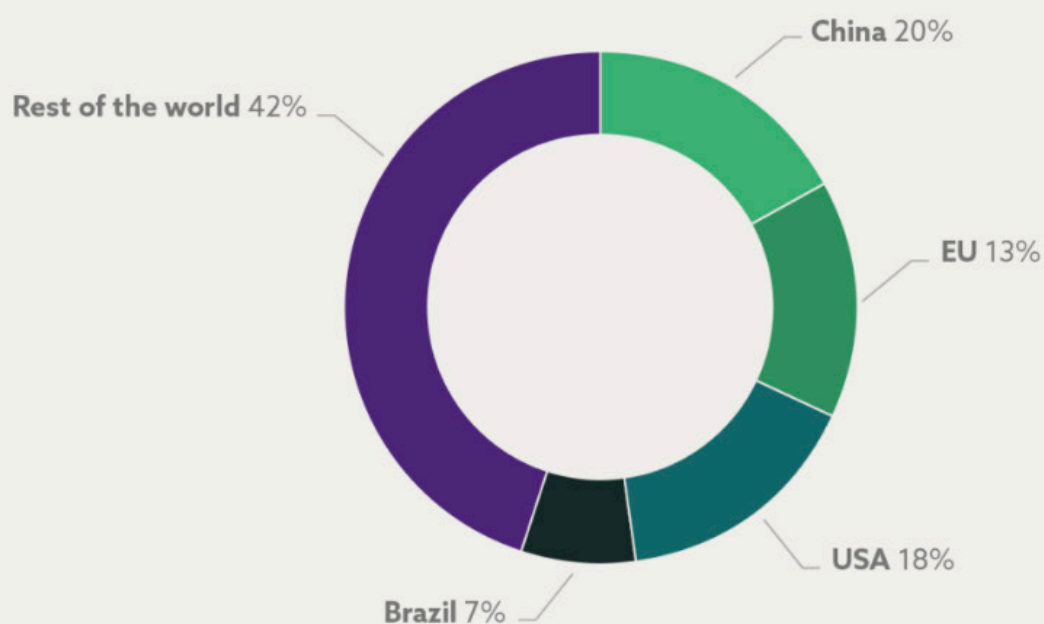
EVOLUTION OF GLOBAL COMPOUND FEED PRODUCTION (INDEX 100 = 1999)



GLOBAL FEED MARKET AS PERCENTAGE BY SPECIES - 2022 ESTIMATES

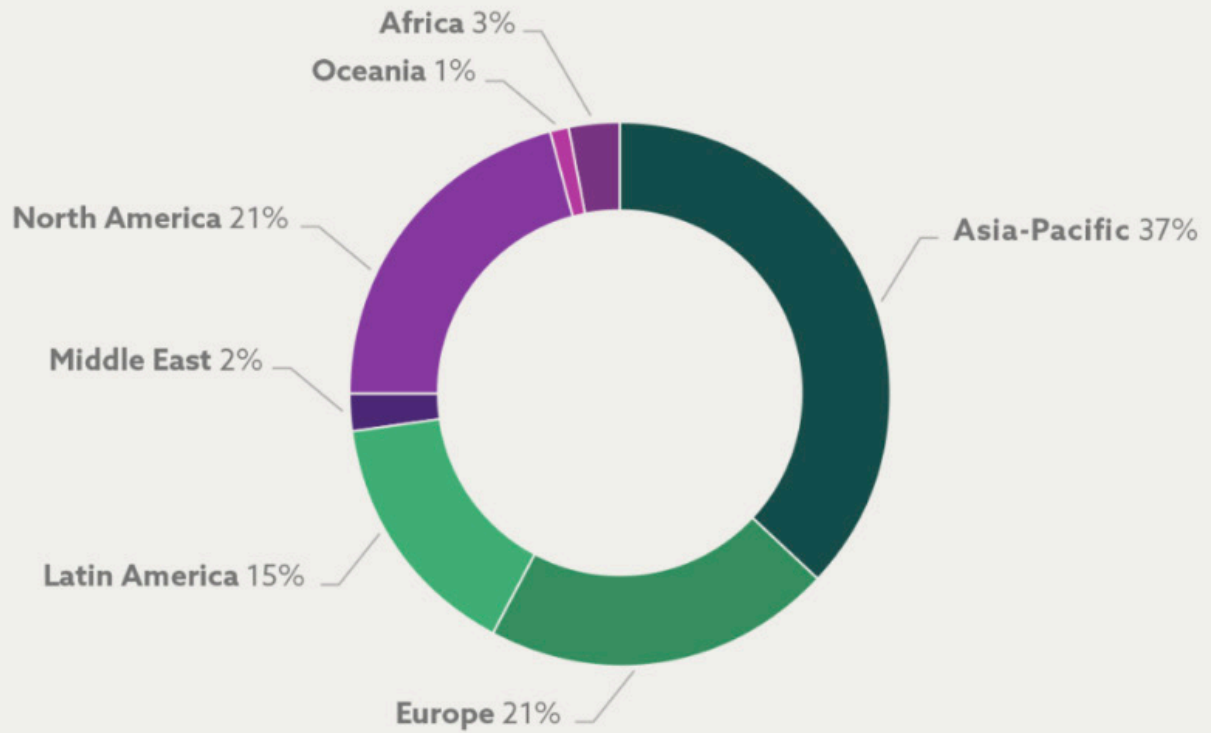


FOUR COUNTRIES PRODUCE OVER CA. 58% OF COMPOUND FEED GLOBALLY



Source: 2022 IFIF estimates / National and Regional Associations

FEED PRODUCTION BY REGION 2022 (MT)








Source: Source: FEFAC / IFIF Regional and National Associations



WORLD PROTEIN PRODUCTION 2022 /ESTIM.) / 2023 (F'CAST) Million metric tons



PROTEIN TYPE	2022	2023	VAR.
 BOVINE	76.3	76.1	-0.2%
 POULTRY	140.8	142.7	1.3%
 PIGS	122.3	121.7	-0.5%
 AQUA	93.4	96.0	2.8%
 MILK	935.9	944.0	0.9%

Source: FAO Global Food Outlook June 2023

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An aerial photograph of a rural farm. In the upper left, a large, multi-story house with a dark roof and a chimney is situated on a green lawn. Next to it is a smaller, single-story outbuilding. A paved driveway leads from a road on the left to the house. The road is bordered by a line of trees. In the foreground, a large, golden-brown field is being harvested by a combine harvester, which is visible in the bottom left corner, kicking up a cloud of dust. The background is filled with dense green trees.

IFIF



Feed the world

International
Feed
Industry
Federation
Annual Report
2022/23



Regional Updates

IFIF Members include national and regional feed associations from around the globe, including from Africa, Asia Pacific, Europe, North and South America and the Middle East. Here you will find our Association Members' 2022/23 updates on their particular region, including feed production figures.

REVIEW UPDATES





National & Regional Updates

Australia
FIAAA & SFMCA

Brazil
SINDIRAÇÕES

Canada
ANAC

China
CFIA

Colombia
ANDI

Europe
FEFAC

Europe
FEFANA

India
CLFMA

Iran
IFIA

Japan
JFMA

Latin
America &
Caribbean
FEEDLATINA

New Zealand
NZFMA

South Africa
AFMA

United States
AFIA



Australia

FIAAA & SFMCA

Australian Market Conditions

During 2022/23, the Australian animal feed industry (members of FIAAA and SFMCA) have experienced an amazing market. The demand for feed has grown over the last few years due to floods and droughts. Livestock producers have started to understand there is a need to meet market specifications and they can meet these specifications more quickly and efficiently when on complete feed. In 2018 feed demand was approx. 5.5 million tonnes with 2022-23 sitting at approx. 8.7 million tonnes.

The poultry industry has seen the largest growth with 50.1 kg per capita of chicken meat being consumed. Australia has also seen feedlot numbers over 1.1 million head on feed for over 12 months. Increasing numbers of lambs are being fed due to the huge demand for exported product.

On a positive note, the grains industry had a bumper year, with it being the largest crop on record. This is the second year in a row of a record crop. Grain prices have not fallen due to demand from Australia's export markets that have increased dramatically.

The issues experienced during COVID have somewhat been rectified. However, the industry (along with the rest of the country) is still experiencing labour shortages and domestic transport issues.



Feed Ingredients and Additives Association of Australia (FIAAA)

The Feed Ingredients and Additives Association of Australia was formed to meet the needs of our animal feed and petfood industry customers and other stakeholders so that they could be confident of the quality and integrity of feed ingredients and additives being used in Australia. Our work includes advocating and promoting the safe use of feed ingredients and the interests of our 62 members and to cooperate with other stakeholders in the interests of the broader industry.

FAMI-QS

The FAMI-QS Code of Practice is an important part in the stewardship endeavours of our members. It is recognised that certification to the Code gives assurance of the quality of our members' products. The Code is based on international best practice. It succeeds through insistence on:

- Management responsibility & Compliance with AgVet regulations
- Resource management & Traceability of supply
- Product and component standards
- Quality document systems



Over the last three years, FIAAA has been implementing the FAMI-QS system. You cannot be an FIAAA member without it. It was a decision of the members and one that will keep them in good stead for the years to come. FAMI-QS and the FIAAA have signed a strategic agreement of cooperation for the

adoption of the FAMI-QS Code in the region of Australia-New Zealand and Oceania. During this period, 32 members have gained their certification and we have another 19 members working towards it.

See additional work, set out below, undertaken in conjunction with the SFMCA.

For further information on the FIAAA please visit www.fiaaa.com.au



Stock Feed Manufacturers' Council of Australia (SFMCA)

The SFMCA is the national industry association representing 283 corporate and individual manufacturers of stock feed and their supply chain associates located throughout Australia. The association operates within five state-based branches where members meet to address industry specific issues. Together, SFMCA's membership represents 95% of commercial feed manufactured in Australia. From the association's inception, it has played an active role in addressing national industry issues, many of these relating to raw material ingredient supply, quality standards, Federal and state government legislation and regulations.

FeedSafe

The SFMCA operates FeedSafe® as the Integrity Accreditation Program for the Australian stock feed industry. It is third party audited and works in a co-regulatory manner with the Australian governments.

All full (active manufacturer) members of the SFMCA are required to comply with FeedSafe® to retain their Association membership. The central aspect of FeedSafe® is a Code of Good Manufacturing Practice (GMP), which has been developed in conjunction with the Chief Veterinary Officers within each State, and the final document has Primary Industries Ministerial Council endorsement.



FeedSafe® requires feed manufacturers to meet minimum standards in relation to:

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- Premises and mill buildings
- Personnel training and qualifications
- Plant and equipment
- Raw material sourcing and purchasing
- Raw material quality and storage
- Feed formulation and manufacturing
- Product labelling
- Loading, transport and delivery to clients
- Product inspection, sampling and testing
- Customer complaint investigation

There are presently 137 accredited (and provisional) members located over 188 sites that produce 95% of the feed manufactured in Australia.

For further information on the SFMCA please visit www.sfmca.com.au

Combined Work of FIAAA and SFMCA

The last 12 months has seen the FIAAA and SFMCA work closely together on many projects and issues of mutual benefit. Programs of note include:

Australasian Milling Conference (AMC)

A major activity of the industry calendar is the biennial AMC held in conjunction with the Poultry Information Exchange (PIX). Both invited international and local speakers address current issues and the outlook for the feed supply chain. AMC is known to be the major Australasian conference for milling and livestock production in Australia. In May 2022 we had more than 450 registrants (and another 640 registrants for PIX) and some 240 exhibition sites.

Antimicrobial Resistance Stewardship Program

A major issue confronting the feed industry is how to deal with the minimisation of antibiotic use in livestock and human health. The development and subsequent implementation of a Stewardship program will go a long way to assisting industry take responsibility, review progress against targets, reduce use, refine and improve plans and replace antibiotics without compromising health and wellbeing. The Australian feed industry is working closely with Governments and livestock industries to ensure

Australia can avoid resistency issues in Australia and maintain a commitment amongst its members.

National Feed Standards

These Standards will form the backbone of Australia's co-regulation of the feed and additives industry. Having been drafted and reviewed over the last few years the Australian Governments and industry have started the final push to finalise and legislate for the introduction of the Standards. This will ensure consistent legislative oversight across eight jurisdictions. It will also enable to regulate the import of feedstuffs more strongly.

Sustainability Framework

The Members having endorsed the development of a Sustainability Framework for the industry continue to work towards its finalisation. Industry is presently finalising its priorities and can assist other sectors meet their goals whether they are suppliers or customers.

Collaboration along the Supply Chain

The FIAAA and SFMCA work closely together leveraging against each other to ensure a harmonised approach to the issues faced by the production chain. Additionally, we also work closely with Australian Association of Ruminant Nutritionists, Australian Technical Millers Association, Australian Renderers Association and Pet Food Industry Association of Australia as well as Australian state and Federal Governments. Without this level of collaboration major projects cannot be achieved in an effective manner. It's always a pleasure to work with these organisations and kick some goals.

In addition, we also have very strong relationships with the Australian Governments that have provided a strong ability to achieve the transparent co-regulatory system that Australia has been working on for the last seven to ten years.

Both the FIAAA and SFMCA are proud to be active members of the IFIF.

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Brazil

SINDIRAÇÕES

The projected growth of the Brazilian GDP should exceed 1% in 2023, despite the contribution of agribusiness (an activity responsible for 25% of the GDP, which grew by 2.8% in 2022), a sector recognized as a successful model for management, technological innovation and growth of productivity.

However, it is commendable to highlight the enviable resilience of the Brazilian entrepreneur in the face of the meager increase in labor productivity, the contraction of supply due to the scarcity of inputs and exchange rate inflation, which continue to boost production costs and free prices of products and services that erode consumers purchasing power.

Even in the face of such a hostile business environment, the Brazilian animal feed industry is estimated to have advanced 1.1% in 2022, resulting from the production of approximately 82 million metric tons of feed and almost 3,9 million metric tons of mineral supplements.

Indicators continue to point to an increase in the cost of capital, appreciation of the dollar and an increase in commercial transactions, a circumstantial combination that, in the short term, should keep the scenario as troubled as the one seen so far. For the time being, the scenario reveals a fall in assets on the stock exchange and a rise in the dollar, although the possibility of the inflow of more dollars to buy cheap assets and some appreciation of the local currency is not ruled out, depending on the direction and direction of the movements during the transition phase in the contemporary establishment.

Although the tax reform proposal seems to be moving forward, the absence

of a public administrative reform continues to push the limitations still sustained in inflation and fiscal pressure, low competitiveness and poor infrastructure, productivity inertia and rising costs, public inefficiency and inadequate regulation, legal uncertainty, added to the extemporaneous international commercial diplomacy.

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In the face of conjectures and despite the inevitable institutional conflicts, the Brazilian feed industry continues to demand the attention of government officials regarding the implementation of public policies, necessary for the sustainability and prosperity of the production chain, with priority given to the Regulation of Self-Control (Risk-Based Inspection); Tax Reform (isonomy, productivity and competitiveness); Commercial Diplomacy (general preference agreements, strengthening exports of manufactured goods); and Equilibrium of Agricultural Investment and Planning (fair balance of allocation of resources and incentives).

The synergy between the main agribusiness leaders will be fundamental to stimulate new public agents in the elaboration of programs, actions and activities developed directly or indirectly by the State, preferably consisting of planning, execution, monitoring and evaluation instruments, with popular and public segment involved, so that the exercise of citizenship and economic rights are preserved, as guaranteed by the Federal Constitution.

Despite the distressing geopolitical instability and contemporary socioeconomic fragility, it is comforting to know that the enviable performance of Brazil as a global player in the production and export of agricultural products will continue to be guaranteed, in large part by innovation and the robust renewable energy potential, necessary to combat the undesirable effects of climate change.

BRAZILIAN FEED PRODUCTION (MILLION METRIC TONNES)

FEED TYPE	2021*	2022**	% CHANGE
Poultry	42.6	42.6	0.1
→ Broiler	35.4	35.7	1.0
→ Layer	7.19	6.90	-4.0
Swine	19.7	20.6	4.5
Cattle	12.2	12.1	-0.2
→ Dairy	6.4	6.2	-4.0
→ Beef	5.73	5.95	4.0
Dogs and Cats	3.48	3.72	7.0
Equine	0.631	0.637	1.0
Aquaculture	1.45	1.49	2.9
→ Fish	1.35	1.39	2.7
→ Shrimp	0.092	0.098	6.0
Others	0.858	0.861	0.3
TOTAL FEED	80.8	82.0	1.5
MINERAL SUPPLEMENTS	4.12	3.87	-6.0
OVERALL	84.9	85.9	1.1

Source: Brazilian Feed Industry Association/Sindirações. *Estimate. **Forecast

Broilers and Layers Feed

The demand for broiler feed reached 35.7 million metric tons and advanced 1% in response to the higher pace of chick placement, while the production of feed for laying hens totaled 6.9 million metric tons, a decrease of 4%, when compared to the year 2021.

Swine

According to the Official Statistics Institute in Brazil, hog slaughter in 2022 surpassed by almost 6% that accounted for in 2021. In response, the demand for feed increased by 4.5% and reached 20.6 million metric tons, despite the mismatch between the cost of production and the price paid/kg live hog to the producer.

Dairy and Beef Cattle

The cost of production for milk producers and the weak demand for dairy

products at retail led to a reasonable setback in activity, especially during the first half of 2022. The improvement in pastures with the arrival of the rains and, mainly, the increase in the price of milk paid to the producer, resulted in the demand for 6.2 million metric tons of feed, an amount 4% lower when compared to that produced in 2021, despite the improvement in pastures due to the rains. In turn, beef production was supported by shipping to foreign customers, while low domestic demand prevailed due to the economic fragility of consumers. In 2022, almost 6 million metric tons of feed for beef cattle were produced, i.e., a 4% increase over what was calculated in 2021.

Fish and Shrimp

The production of feed for fish and shrimp in 2022 totaled approximately 1.5 million metric tons and advanced 2.9% when compared to the previous year.

Dogs and Cats

Despite the strong increase in production costs (feedstuffs, packaging, energy, wage bill, etc.) and some pass-through to retail prices, demand for dog and cat food exceeded 3.7 million metric tons in 2022 and advanced 7% compared to 2021.

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Canada

ANAC

The Animal Nutrition Association of Canada (ANAC) is the national trade association of the Canadian feed industry. Our 168 members include feed and ingredient manufacturers and distributors, as well as suppliers of a wide range of goods and services to the feed industry. Taken together, ANAC's membership represents 90 percent of commercial feed manufactured in Canada.

ANAC acts as the voice of the feed industry, engaging with government policy makers, regulators, producer groups and feed industry stakeholders. Our efforts are aimed at fostering a favourable regulatory and business environment for the industry, while supporting initiatives to maintain the highest standards of feed and food safety. ANAC continues to prioritize the development of tools to support the feed industry in adapting to change.

Throughout 2022 and into 2023, ANAC's dedicated team of six staff members based in Ottawa, Ontario, Canada has undertaken a wide range of activities as described below.

Supporting industry through the Highly Pathogenic Avian Influenza outbreaks

To ensure the feed industry's voice was heard in discussions surrounding the ongoing challenges of the Highly Pathogenic Avian Influenza (HPAI) outbreaks, ANAC engaged in national and provincial meetings and working groups alongside key stakeholders, including the Canadian Food Inspection Agency (CFIA) and poultry and egg associations. ANAC collaborated in generating solutions that supported the feed industry, including revisions to permitting to reflect a more feasible approach to feed movements.

- newly identified HPAI cases
- movement controls
- biosecurity best practices



Persevering through supply chain disruptions

From extreme weather to labour shortages and lingering effects of the COVID-19 pandemic, the Canadian feed industry faced numerous supply chain challenges in 2022. To ensure the uninterrupted availability of livestock feed supply, ANAC reengaged its Supply Chain Advisory Committee to identify critical issues and generate practical solutions.

ANAC worked with the CFIA to rapidly implement temporary measures allowing for ingredient substitutions and flexibilities around minimum nutrient requirements without regulatory burden or reprisals. With these concessions, the Canadian feed industry was able to continue supplying safe and nutritious livestock feed during this challenging time.

Paving the way for the modernized *Feeds Regulations*

After 13 years of dedicated effort, ANAC continues advocating for the feed industry in the development of modernized regulations. Collaborative work with the CFIA, Health Canada (HC) and other industry associations has resulted in meaningful revisions to the proposed regulations that add value across agri-food sectors.

Once the new Feeds Regulations are officially published, anticipated for Fall 2023, the implementation of the new legislation will be phased in over 18 months.

ANAC has begun offering training and developing tools and resources to support our members in transitioning to the new regulations. Providing guidance to our members through channels such as webinars and one-on-one support will continue to be a priority.

New milestone in the journey to accessible in-feed VHP use

Previously, veterinary health products (VHPs) were not permitted to be mixed into feed, although this is set to change with the publication of the modernized regulations. At the moment due to the outcomes of a pilot project, 12 VHPs are notified for use in non-medicated and medicated feeds. ANAC continues working closely with the CFIA and HC to ensure government and industry are ready to notify new VHP options upon the publication of the updated Feeds Regulations, 2023.

Leveraging industry expertise to encourage policy advancement

Reduced burden for production performance claims

ANAC worked with the CFIA to broaden the applicability of efficacy data for production performance claims for feed products. New flexibilities now allow data to be used more broadly with generalized production performance claims, extrapolation between physiologically similar species, and use of higher p-values to characterize trends or tendencies.

Gut modifier product category offers new possibilities for environmental benefit claims

Previously in Canada, gut modifying products were recognized as drugs, not feeds. Recently published guidance will improve access, utility and marketing for feed products with a mode of action in an animal's gastrointestinal tract.

ANAC alongside producer groups successfully advocated for the allowance of environmental claims for products in this category. This will hopefully lead to the approval of feed products with environmental benefit claims, including reduced enteric methane production.

Improving the environmental sustainability of the feed industry

As demands on environmental performance continue to evolve, ANAC remains committed to sustainability. The Association has been involved in several sustainability initiatives:

- NAC joined the Technical Expert Team to provide expertise for the development of the Livestock Feed Management Protocol. This protocol will be part of the Federal GHG Offset System.
- The Association remains a member of the Global Feed LCA Institute (GFLI), which provides a publicly available feed Life Cycle Analysis (LCA) database.
- ANAC became a sponsoring partner of the National Index on Agri-Food Performance, a collaborative effort between private-public partners to develop a comprehensive view of sustainability within Canada's agri-food sector, from food production to retail.

Having a voice in Canadian animal health issues

ANAC joined the membership of Animal Health Canada in May 2023. As a member ANAC will provide a voice for the feed industry to inform work around animal health challenges including emergency response plans for animal disease outbreak such as African Swine Fever as well as antimicrobial resistance.

Feeding Canadian livestock with confidence

FeedAssure® v.4 (2022) program implemented

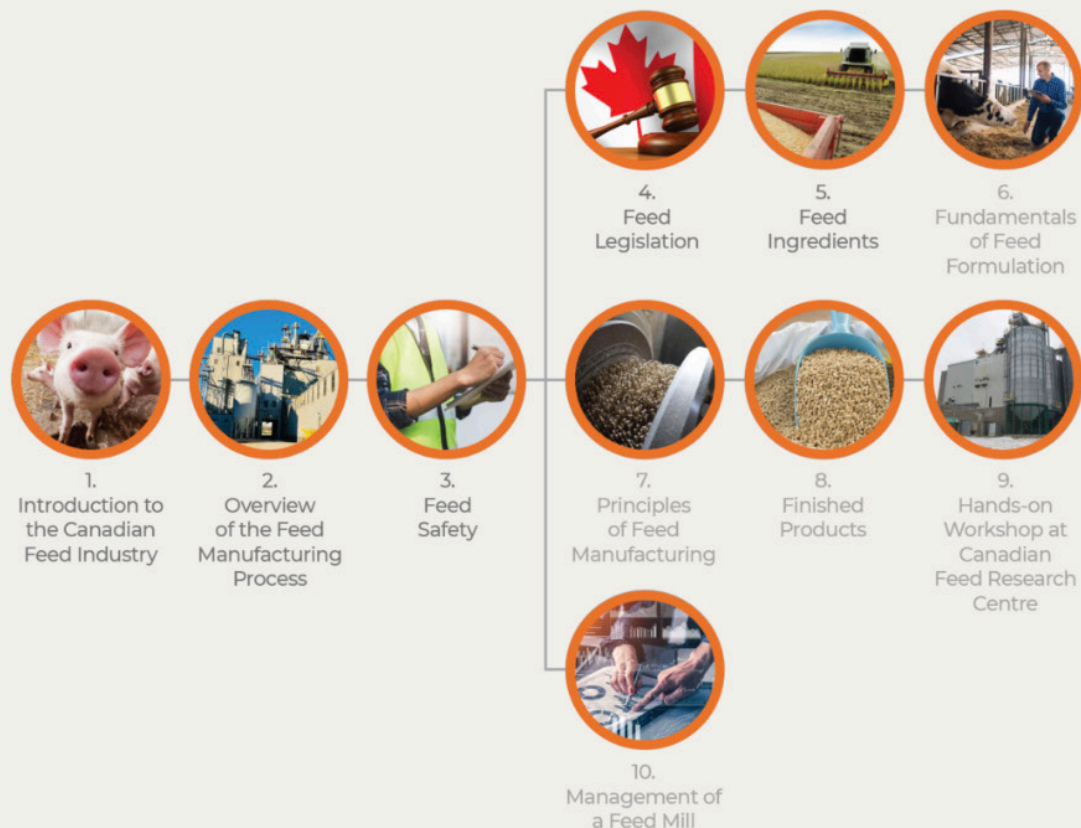
A new version of FeedAssure®, a comprehensive feed safety management and certification program managed by ANAC, was launched in March 2022. The standard was updated to reflect changes and scientific advancements in the

standard was updated to reflect changes and scientific advancements in the feed industry, as well as to conform to the anticipated modernized regulations. The program remains the gold standard for feed safety in Canada, maintaining the core principles of HACCP while expanding on areas such as biosecurity, supplier approval, feed defense, feed fraud and crisis management. As of March 1, 2023, all facilities are being audited to the revised standard.

Sharing knowledge with a broad audience

Providing quality feed industry education

The [Canadian Feed Industry Education Program](#) (CFIEP) is a modular course that provides valuable insights into diverse feed industry topics. Designed to be applicable across different roles within the industry and beyond, CFIEP combines foundational knowledge with practical applications. The release of the first four online modules in 2022 generated positive responses from industry employees, producers, students, academics, and government personnel in Canada and internationally. Further modules will be launched in 2023 and these learning opportunities are open to individuals anywhere in the world wishing to know more about the Canadian feed industry.



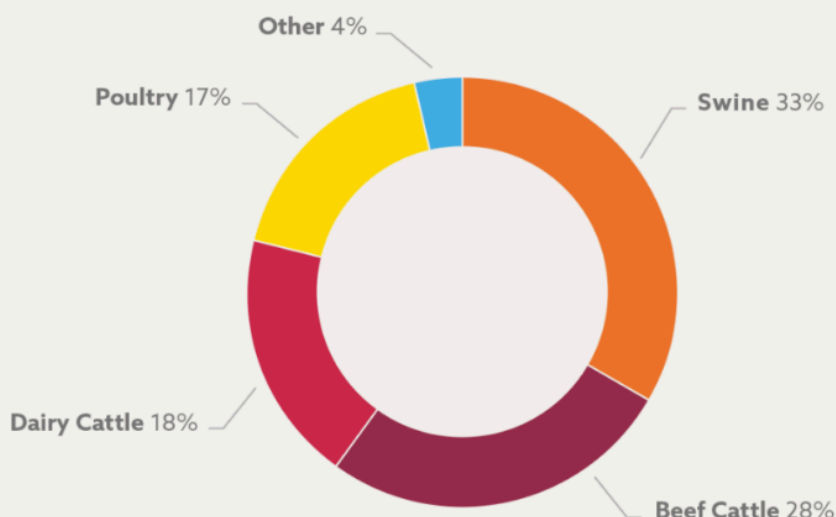
Helping stakeholders understand feed consumption across Canada

ANAC published its second annual [Canadian Livestock Feed Consumption Statistics Report](#), providing estimates of livestock feed consumption volumes in Canada broken down by species and geography. The report aims to help stakeholders understand livestock feed demand across Canada and

track changes in the Canadian feed industry over time.

FEED CONSUMPTION BY SPECIES 2021

Canadian livestock consumed an estimated **28.9 million tonnes of feed** (not including forages) in 2021.



Source: ANAC

Fostering scientific innovation

To address concerns related to African Swine Fever potentially entering North American feed facilities, ANAC, along with Kansas State University, IFEEDER, the Swine Health Information Center and the United Soybean Board jointly funded research on feed mill decontamination. The objective of this project is to identify efficient and practical methods for decontaminating feed mills in the event of a disease outbreak. The research project is expected to be completed in 2023.

For more information on ANAC and the work of the Association, please visit: www.anacan.org.

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China

CFIA

In 2022, Chinese industrial feed output value and output both increased the adjustment of product structure accelerated, the overall operating situation of large-scale enterprises remained stable and the innovation in the feed industry developed rapidly.

Gross output value of feed industry keeps growing

The gross output value of the industrial feed industry was 1316.85 billion yuan (CNY), up 7.6% year on year, total revenue was 1261.73 billion yuan up 8.0% with the output value of feed 1181.66 billion yuan and total revenue 1136.38 billion yuan, up 7.8% & 8.2% for each, output value and total revenue of feed additive reached 126.77 billion yuan and 116.79 billion yuan, up 9.8% & 5.2%, and feed machinery products was 8.42 billion yuan, down 26.9% and total revenue 8.56 billion yuan up 11.1% than 2021.

Total industrial feed production reached 0.3 billion tons

The total industrial feed output was 302.234 million tons, up 3.0% than last year, with the output of compound feed was 280.212 million tons up 3.7%, concentrate feed was 14.262 million tons down 8.1%, additive premix was 6.522 million tons down 1.6%. The output of pig feed increased by 4.0% reached 135.975 million tons. The output of layer feed was 32.109 million tons, down 0.6%. The output of broiler feed was 89.254 million tons, up 0.2%; the output of ruminant feed was 16.168 million tons, up 9.2%. The output of aquatic feed was 25.257 million tons, up 10.2%. The output of pet feed was 1.237 million tons, increased by 9.5%. The output of others feed was 2.233 million tons, down 7.2%. In terms of sales methods, the bulk feed was 107.031 million tons, up 18.5% than 2021, accounting for 38.2% of the total

output of compound feed and up 4.8%.

The output of Feed additive production experienced a small fall

The output of feed additives was 14.688 million tons, down 0.6% year on year; with the directly prepared feed additives 13.687 million tons and 0.1% up. The output of mixed feed additives was 1.001 million tons, down 8.8%. The output of amino acids, 4.492 million tons, up 5.6%, the output of microbial preparation and non-protein nitrogen keeps increasing, up 6.7% & 59.1%. Vitamins 1.5 million tons down 15.4%, and output of mineral elements, enzyme preparation, antioxidant was down 0.7%, 12.5%, 14.1% year on year respectively.

Intensive operation adjusted

36 feed mills' production scale reached 1 million tons or more, decrease of 3 mills over the previous year, and their output accounts for 57.5% of the total feed output in China, down 2.2% year-on-year. There are 6 enterprise groups in China with an annual output more than 10 million tons, 947 feed mills with an annual output of more than 0.1 million tons of feed, decrease of 10 mills over the previous year. Total output was 173.81 million tons, down 1.8%. The proportion in the total national feed production is 57.5%, 2.8% down year on year. 13 feed mills have an annual output of more than 0.5 million tons, 1 feed mill less than last year and the maximum output of feed mill is 1.276 million tons.

Regional layout keeps stable

There are 13 provinces with feed output exceeding 10 million tons in China, same as 2021. They are Shandong, Guangdong, Liaoning, Guangxi, Henan, Jiangsu, Hebei, Sichuan, Hubei, Hunan, Fujian, Anhui and Jiangxi. The output of Shandong province reached 44.848 million tons, up 0.2% year on year; the output of Guangdong province was 35.272 million tons, down by 1.3%. The total output value of feed products of Shandong & Guangdong provinces continues to remain over 100 billion yuan with 171.2 billion yuan and 151.7 billion yuan respectively. The feed output of 22 provinces increased year on year, of which 5 provinces including Ningxia, Fujian, Inner Mongolia, Anhui and Henan, increased by more than 10%.

For more information, please visit www.chinafeed.org.cn

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Colombia

ANDI

The Chamber of Feed Industry is mainly responsible for managing the representation and communications in front of different entities of the National and Regional Government, in order to make public policy recommendations that result in a better framework to carry out business activity in the country. Currently, the Chamber works hand in hand with public entities of the national order, associations and private companies to contribute to the sustainability and competitiveness of the country in the production of animal protein, improve health and nutrition of the Colombian population and the welfare of pets.

The Chamber of Feed Industry brings together the main companies in the country that produce animal feed in its different lines: poultry, swine, livestock, pets, minor species and aquaculture. The Feed Industry is the agribusiness link of the livestock sector chain that converts raw materials of agricultural origin into food for the production of meat, fish, eggs, milk, cheese and dairy products, being the primary source of animal protein. The companies affiliated to the Chamber of Feed Industry represent the 85% of the total production of manufactured commercial animal feed.

The Chamber is currently working on four strategic issues: Sustainability, Competitiveness and Internationalization, Legal Certainty and Regulatory Simplification, and Innovation and Digital Transformation.

The Chamber of Feed Industry achieved strategic results in favor of the

The Chamber of Feed Industry achieved strategic results in favor of the industry, seeking to facilitate the management of each of its members by the modernization of a 24-year-old regulation, thus enabling international regulatory harmonization; the promotion of international standards for feed safety, best manufacturing practices and strategies for the development of an adequate risk profiling model; the support of digital transformation processes and regulatory simplification in the feed authorities to increase competitiveness in the industry and the agribusiness sector; and by the promotion of education and specialized training in best practices for the industry.

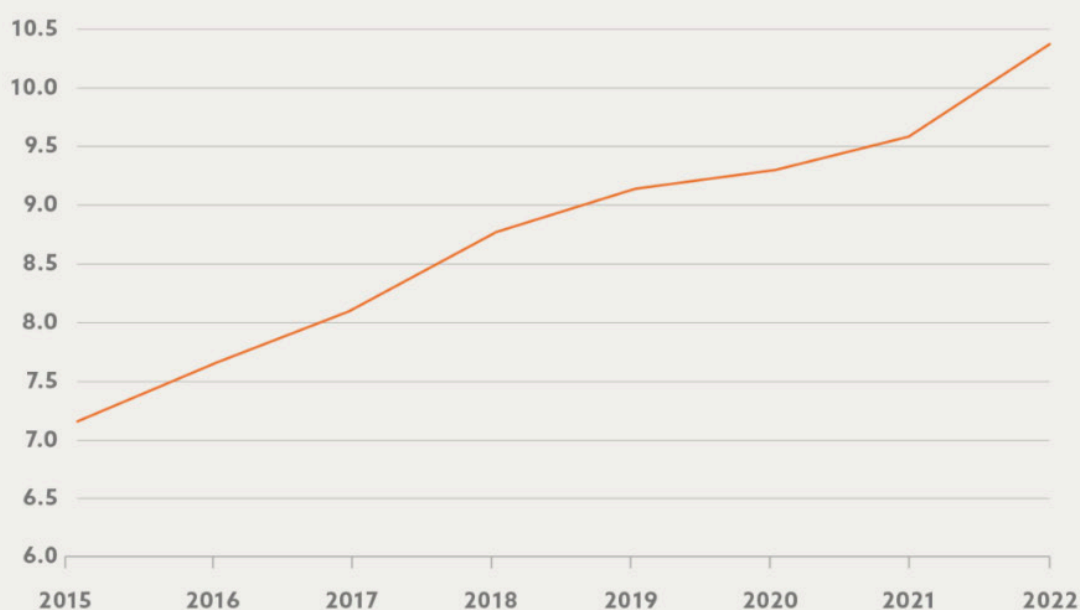
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FEED INDUSTRY STATISTICS (TONNES)

	2021	2022	GROWTH
Total Feed Production	9,646,871	10,360,374	7%

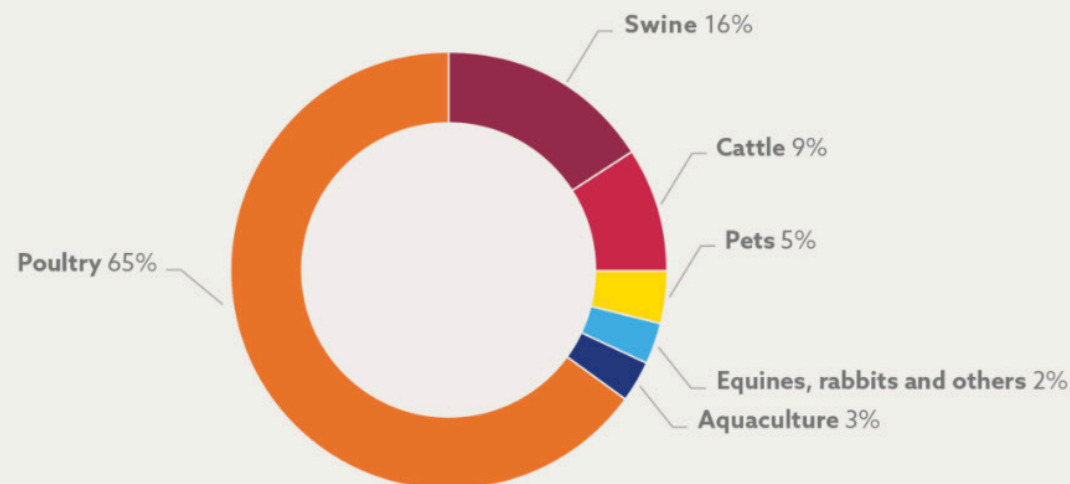
Source: Chamber of Feed Industry, ANDI estimates.

FEED PRODUCTION IN COLOMBIA, 2015 - 2022 [MILLION TONNES]



Source: Chamber of Feed Industry, ANDI estimates.

BREAKDOWN OF FINISHED FEED PRODUCTION BY CATEGORY, 2022



Source: Chamber of Feed Industry, ANDI estimates.

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Europe

FEFAC

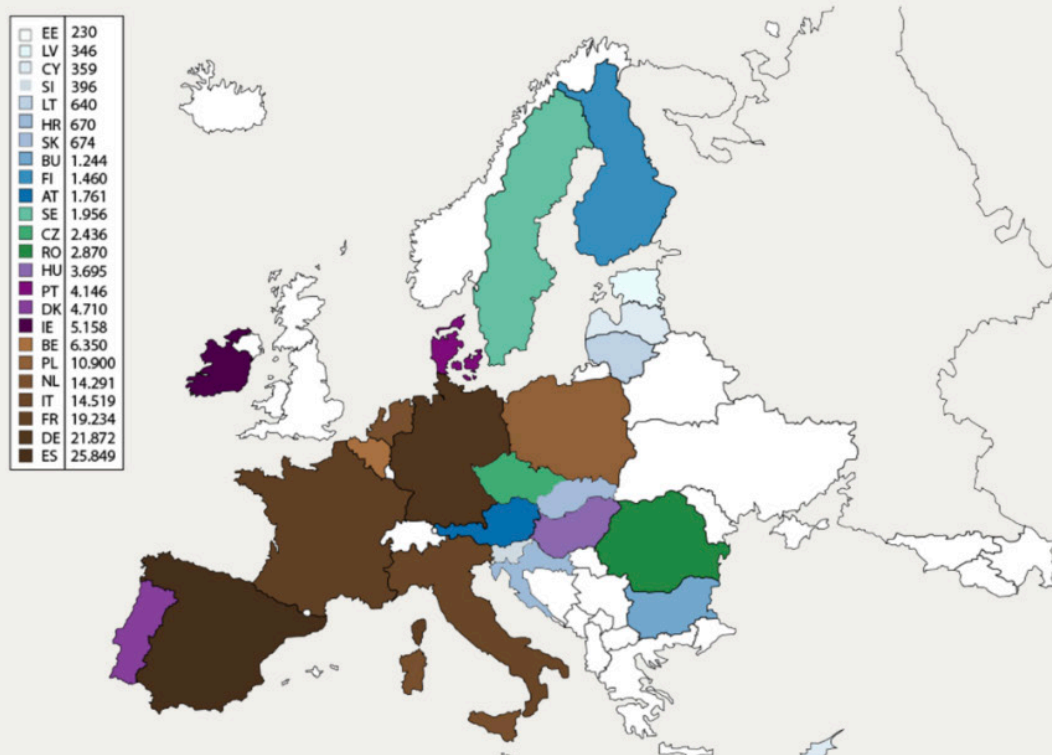
FEFAC, the European Compound Feed Manufacturers' Federation, represents 21 full members in 21 European countries as well as Associations in the UK, Switzerland, Turkey, Serbia, Russia and Norway with observer/associate member status. The European Manufacturers of Feed Minerals Association (EMFEMA) as well as the European Former Foodstuffs Processors Association (EFFPA) also hold associate membership. The European compound feed industry employs over 100,000 persons at approximately 3,500 production sites often in rural areas which offer few other employment opportunities.

Key Market Developments

Compound feed production estimates for 2022

According to data provided by FEFAC members, the EU compound feed production (EU 27) for farmed animals in 2022 is estimated at 145,7 Mt.¹, i.e. a decrease of 3.8% compared to 2021 due to the combined effect of the spread of animal diseases (ASF & AI). The Russian invasion of Ukraine and the related EU energy crisis have significantly impacted the EU economy and inflation, leading to reduced demand for animal products, hence impacting the production and demand for feed. In general, only Austria, Finland, Ireland, Poland and Slovenia managed to slightly increase/stabilise their feed production, "Green environmental and animal welfare" policies continued to play a role in key member states (Belgium, Germany, the Netherlands) and kept the pressure on reducing livestock population numbers.

EU COMPOUND FEED INDUSTRY 2023 (1000 T)



Source: FEFAC

The EU pig feed sector was the most affected, with production falling by as much as 3 Mio.t (-6.5%) compared to 2021. Similarly, poultry feed production in 2022 experienced a decrease of almost 2 Mio.t (-3.5%) compared to 2021. Cattle feed production slightly decreased by 0.5 Mio.t (-1%) as a result of the stabilization of the production compared to 2021 when severe drought triggered increased demand for dairy feed (consequently this has increased demand for compound feed).

In some countries, especially small farms closed their businesses due to the deteriorating economic situation and profitability of farms. Pig meat exporting countries reduced their production as China continued to recover from ASF and no longer imports pork volumes at previous levels. In addition, the high cost of utilities during the winter led to the situation when some farms skipped production cycles, all impacting the demand for feed.

Looking at the market outlook for 2023, production of main animal species (but poultry) is expected to further decrease². The herd decapitalisation is progressive in the main EU producers while uncertainties around feed and fertiliser prices as well as inflation are influencing the market. This will have undoubtedly an impact on the feed market. FEFAC estimates that EU27 compound production in 2023 will further decline by 1.5%. The poultry & pig

feed sectors may experience a rebound in Q4 but this will not compensate for the entire loss in 2021/2022. Avian influenza, economic uncertainty, and “green and animal welfare” policies continue to be the main market drivers for the upcoming year. Regulatory uncertainty may further weigh on farmers and their decisions to stay in/leave businesses. Serious doubts remain on the impact of bans/restrictions on raw materials import from Ukraine on local markets and production in neighbouring (HU, PL, SK, RO) & other (BG) countries. At the same time, drought problems in southwest Europe may lead to increased needs for imports of raw materials, hence it will be important to maintain the functioning of the Black Grain Sea initiative. Growing imports of animal products also from other third countries may further weigh on EU feed demand.

2nd Charter Progress Report 2022

On 7 September 2022, FEFAC published its 2nd Charter Progress Report 2022³, providing an overview of the past year on the FEFAC activities and deliverables in relation to the five ambitions that were included in the FEFAC Feed Sustainability Charter 2030 released in September 2020. These ambitions jointly provide a comprehensive approach to how the European Feed Industry can contribute to the development of more sustainable livestock and aquaculture value chains.

The 2nd Charter Progress Report points out the importance of increasing the focus on Ambition V on the socio-economic environment and resilience of the livestock & aquaculture sectors in view of the challenging production conditions, which endured the exacerbating effect of the Ukraine crisis of a global market rally for feed grains, which already started at the end of 2021.

Circular Feed publication

In June 2022, FEFAC released its publication on “Circular Feed – Optimised Nutrient Recovery Through Animal Nutrition”⁴. The publication showcased the European feed industry’s practical interpretation and illustration of the circular feed concept, providing current-day examples of how the sector contributes to recovering nutrients from the circular economy. In this publication, FEFAC invites regulators to proceed with a systematic review of legislative bottlenecks in the EU regulatory framework which currently restrict a higher level of circularity in EU food systems through innovative animal nutrition solutions.

Publication on Advanced feeding strategies for enhanced circular sustainable livestock and aquaculture production

In its latest publication “Advanced animal feed strategies to support the transition towards more sustainable and circular livestock and aquaculture production”⁵ FEFAC presents an overview of the potential contributions to

more sustainable supply chains of animal feeding strategies whether based on specific ingredients, formulation or process. In addition, practical case studies showcasing existing and emerging sustainable animal nutrition techniques available on the FEFAC website⁶. It also directly connects to the 5 key ambitions detailed in the FEFAC Feed Sustainability Charter 2030⁷.

The purpose of this publication is to facilitate access to chain partners and decision-makers to sound scientific-based information on the techniques themselves, how they work and for which species, but also some considerations on the economic impacts and trade-offs. It cross-refers to the work done by the IFIF Animal Nutrition Innovation subgroup as regards the contribution of animal nutrition to animal health and welfare.

With this initiative, FEFAC wanted to show the decision makers, our chain partners and the public by concrete examples that there is a science-based alternative to having a narrow focus of simply bringing down the livestock population in the EU.

This publication focusing on practical case studies showcasing existing animal feeding strategies are now available [online](#).

EU Deforestation Regulation

The EU Deforestation-free supply chain Regulation (EUDR) was published in June 2023, with application of the key articles in December 2024. Still, numerous operational questions on practical implementation remain open for clarification by the European Commission and the big question is how Member States will implement it, in particular regarding compliance of certain chain of custody systems used widely in soy commodity trade. FEFAC will continue to lobby for harmonised implementation at the Member State level of the new Regulation, which will install a new paradigm for deforestation-free soy sourcing as from 2025. In the meantime, FEFAC performed a mid-term review of its Soy Sourcing Guidelines addressing two key elements:

- Turning the criterion on conversion-free soy from desired into essential
- Strengthening and clarification of the verification requirements, in particular on conversion-free soy

FEFAC continues to call for allowing certified purchases to play a key role in meeting the requirements to deforestation-free soy sourcing.

EU/UKR & crisis management

The destabilisation of Ukraine by the Russian invasion since 24 February 2022 impacted massively on global grain, food and fertiliser markets, as Russia and Ukraine are key international agricultural exporters. FEFAC established a new FEFAC Task Force on emerging feed supply chain security threats to gather

data and information (on stocks, logistic issues, identifying raw materials dependencies and possible impacts) from its members & feed industry experts from Ukraine, in order to provide the EU Commission with accurate and timely market impact analysis directly from the field. Among others, FEFAC pointed to a sufficient exportable surplus available in America (USA, Argentina, Brazil) to substitute “short-term” blocked Ukraine exports of maize for feed use. However, with a potential risk of non-compliance of America’s maize with EU standards on pesticide residues and GMOs, FEFAC called for some relaxation limited in nature and time to these standards to facilitate access to this corn while not compromising public health. These requests were heard by the EU Commission allowing the possibility for Member States to grant temporary MRLs in case of risk of acute shortage (article 18(4) of Regulation (EC) No 396/2005) in the end. Temporary granted national MRL were introduced by Spain and Portugal in the following months.

- Highlighting the importance of new trade agreements and the importance of the flexibility of a Single Market “Trade-limiting policies can increase vulnerability to shocks.
- Highlighting the growing competition for the availability of biomass or disruption in supply chains for co-products by the Biogas sector can create market disturbances resulting from “unintended consequences” linked to the EU energy crisis management.
- Pointing out to the EU feed vulnerabilities such as dependency on imports of protein-rich feed (e.g. soya meal), feed additives or micro-ingredients & calling for measures to address them.

Review of EU protein strategy

FEFAC is actively participating in the EU protein policy review. The Commission plans to update its 2018 report Development of plant proteins during 2023. The report should look at the issue from a more holistic perspective focusing also on food demand and supply of plant-based protein, next to feed demand, but also other circularity aspects of livestock and alternative protein sources (algae, insect, fermented products, amino acids, cultivated meat). FEFAC key messages are:

- Data is key: the EU feed protein balance sheet proved to be a very valuable source of information in the process of reviewing protein policy, especially when it comes to suggesting specific policy actions. The upcoming Livestock protein efficiency initiatives is expected to further improve the understanding of the EU protein market and facilitate targeted actions.
- The feed industry is committed to further enhancing its circularity by working eg. towards even higher usage of co-products in their feed

formulas, however increasing usage for those materials coming primarily from the bioenergy sector may compromise this objective.

- Member States' involvement in the policy reviewing process is crucial, not only from an implementation perspective but also from a „lessons learned“ perspective as many MS already initiated their own national protein strategic plans in the last decade.
- EU's dependency on high protein feed materials should not be exchanged for another dependency on feed additives (in case there is a „push“ for low protein diets with higher use of synthetic amino acids).
- The feed industry is ready to use more alternative proteins, however, they must become more economically feasible. New „upcoming“ alternative proteins (e.g. biorefining) are also very promising.
- The soil productivity is not always suitable to grow food-quality grains and oilseeds. The discussion should not be oversimplified e.g. suggesting to use land that produces feed to produce directly grains and oilseeds for the food market.
- Farmers need to have tools such as new genomic techniques to face Farm to Fork implications (less fertiliser usage by 2030). Otherwise, the protein content of grains and oilseeds will suffer.

Environmental performance

The European Commission published in March 2023 its proposal for an EU Directive on Green Claims, meant to provide a horizontal framework for environmental claims in a B2C context for all economic sectors. The European Commission foresees the legislation to play an important role in tackling „greenwashing“ and have consumers protected from unsubstantiated green claims. Regretfully, the proposal does not grant to the Product Environment Footprint (PEF) methodology the status as privileged reference method that was expected. The key challenges to the suitability of the PEF method focused on supposedly favouring intensive over extensive production systems, misjudging organic production and not being able to capture certain impacts such as biodiversity or animal welfare.

For FEFAC, this proposal on Green Claims does not deliver a direct recognition of PEF and the PEFCR Feed that FEFAC anticipated, but it does not prevent either for FEFAC to continue to position the PEFCR Feed as the key methodological reference for communication on the environmental footprint of feed, taking into consideration that the EU Green Claims proposal deals with B2C communication primarily. In the past year, a FEFAC-FEFANA Joint Task Force Green Labelling has been working on guidance for the use of the PEF method as a basis for green feed labelling for endorsement by authorities by the end of 2023.

On 31 October 2022, the GFLI published an updated version of its database, which was originally made available in November 2020. It includes a variety of changes and new feed ingredients (rendered products, animal protein products, former foodstuffs, US & Canada state-level crop data, Brazil crops and processed ingredients at a state/regional level). The publication is accompanied by a presentation with explanations about the update. The GFLI database now contains 1511 datasets.

Contaminants

The revision of maximum limits for many contaminants, including arsenic and dioxins is ongoing. Among the most critical orientations, FEFAC flagged the establishment of a maximum level of p-phenetidine as an indicator of the use of ethoxyquin as an antioxidant, which is no longer permitted in the EU. FEFAC continued its coordinated lobbying to avoid the setting of maximum limits for mycotoxins other than aflatoxin in compound feed. The discussions with Member States were postponed in 2022 due to the geopolitical context of the impact of the war in Ukraine on the EU and global grain market. They are expected to resume in the second half of 2023.

FEFAC participated in consultations on the establishment of carry-over limits for antibiotics in non-target feed. The option currently yielding most support from authorities is the setting of the limits based on 1% of the lowest dosage, which may seriously compromise the ability to produce medicated feed in multi-purpose feed mills.

The EU has also launched an action plan to phase out the production and use of PFAS and, in parallel, is establishing limits for feed and food. The entry into force of the limits for products of animal origin in January 2023 showed that certain feed ingredients such as fish meal could be highly contaminated, with risk of non-compliance of organic eggs in Denmark. Specific limits for feed may be set for certain PFAS in the coming years

For more information please visit <https://www.fefac.eu/>

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- 1 Without Luxembourg, Greece and Malta, from 2016 on, FEFAC no longer includes dry pet food production in its statistics, considering that a large part of the production was missing in national statistics.
- 2 https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/short-term_en
- 3 https://fefac.eu/wp-content/uploads/2022/09/Final_Feed-sustainability-charter-annual-progress-report-2022_WEB-1.pdf
- 4 <https://fefac.eu/wp-content/uploads/2022/06/FEFAC-circular-feed-publication.pdf>
- 5 https://fefac.eu/wp-content/uploads/2023/06/Final_Advanced-Feeding-Strategies_Brochure_Print_WEB.pdf
- 6 <https://fefac.eu/pages/sustainable-animal-feeding-strategies/>
- 7 <https://fefac.eu/home/fefac-feed-sustainability-charter-2030/>
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Europe

FEFANA

FEFANA is the EU Association of Specialty Feed Ingredients and their Mixtures. It acts as the united voice of the specialty feed ingredients business in Europe. Its membership comprises manufacturers and traders of feed additives, functional feed ingredients, premixes and other mixtures of specialty ingredients that enter the food chain via feed. FEFANA facilitates the dialogue between EU institutions and feed business operators while promoting feed and food safety and a fair and competitive market.

FEFANA's overall mission is to promote, safeguard and defend the common and general interests of the industry of SFIs and their Mixtures. It represents the views of its Members to the EU authorities and, via its network of national partners in key EU Member States, also to the Competent Authorities of these countries. FEFANA has gained a strong positive reputation across Europe to key decision-makers and it has built close contact with other stakeholders of the feed and food chain.

FEFANA is a well-recognized IFIF full member. Representing the supplying industry, FEFANA plays a significant role in the feed & food chain and shares a common responsibility with the compound feed industry. FEFANA views IFIF as the interface to certain key international organisations, such as FAO, Codex, OIE and ISO, and the ideal platform to meet with other actors of the feed and food chain.

1. Main current working topics

Modernisation of the Feed Additive Regulation (EC) No. 1831/2003

FEFANA has been positioning itself very early in the process, flagging **critically important items** since the European Commission had initiated the Evaluation of Regulation (EC) 1831/2003 as part of the Better Regulation agenda in 2018. Since then, FEFANA has been one of the key stakeholders for the EC to revise this piece of legislation.

The revision of Regulation (EC) No. 1831/2003 aims at facilitating the placing on the market of innovative feed additives enabling more efficient and sustainable livestock production – a very important recognition for the sector.

FEFANA and its members recognise that there are still a number of aspects that need to be given greater emphasis and tackled in order to truly unleash the potential of the sector. This would allow not only to deliver on the ambitious goals of the European Green Deal, but also to provide much needed modern solutions to the livestock chain and society's needs.

Examples of such aspects are:

- the recognition of **feed additives' contribution in reducing the need for the use of antibiotics**, which in turn contributes to the fight against antimicrobial resistance
- more clarity and flexibility in the definition and functions of feed additives to create better grounds for innovation
- a more flexible framework and enhanced protection for innovation, through time-limited exclusive rights for applicants for authorisations that commit to applications and to placing innovative additives on the market
- the possibility of communicating innovative benefits using claims for feed additives and premixtures
- a measure providing for a specific Community Code of good labelling practice
- the revision of the current efficacy assessment undertaken by EFSA to move to a less restrictive approach allowing applicants the possibility to fully describe the effects, purpose, and intention of use of the feed additive.

FEFANA is (pro)actively involved in making sure that these and other elements are addressed in the on-going process of modernising the key regulation for our industry. Nevertheless, it has been recently announced by the European Commission that the launch of the legislative proposal has been officially postponed (likely) to the next term of the Commission in 2024. The REFIT Evaluation report is expected to be released soon. FEFANA is closely following the ongoing developments.

FEFANA consortia for the authorization of feed additives in the EU

Through an efficient cooperation system, manufacturers and importers of feed additives were offered the opportunity to participate in FEFANA Consortia and jointly prepare and submit applications for the re-authorisation of over 1000 additives. These are being evaluated by European Food Safety Authority (EFSA) prior to re-authorisation by the European Commission. The evaluation phase of some Consortia dossiers is still on-going and its completion might take a few more years.

FEFANA is committed not only in the daily management of the dossiers, but also on the practical implications that each re-authorisation may carry.

As of 2020 FEFANA also facilitates the creation of collaborative platforms for the renewal of authorisations for non-holder specific feed additives. While not acting as the applicant, FEFANA assists in the establishment of collaboration platforms allowing interested members to work jointly for dossier submissions for non-holder specific feed additives. Where required, FEFANA also offers administrative assistance and acts as contact point with competent authorities.

2. Resources

FEFANA online classification tools

The distinction between feed materials and feed additives has critical implications for the placing of these products on the EU market. Feed business operators and competent control authorities are frequently faced with questions regarding the classification of products. EU guidelines for the distinction between feed materials, feed additives, biocidal products and veterinary medicinal products (EC Recommendation 2011/25/EU of 14th January 2011) were established to avoid inconsistencies and to provide an appropriate level of legal certainty, misclassification having potentially severe consequences. Since the guidelines remain somewhat theoretical, a need for such a useful tool was perceived by the operators. The FEFANA on-line tool does not aim to substitute for the operators' or the authorities' responsibility to take a decision but is expected to be an important benchmark in the decision process: <http://fefana.org/ClassTool/>

FEFANA has also launched another user-friendly tool to support business operators in the categorization of the different types of mixtures as defined in the EU's regulatory framework. The new tool is based on the definitions covered by the three reference EU Regulations for mixtures:

- Regulation (EC) No 1831/2003 on additives for use in animal nutrition (premixtures);

- Regulation (EC) No 767/2009 on the placing on the market and use of feed (compound feed);
- Regulation (EC) No 327/2015 on the requirements for the placing on the market and conditions of use of additives consisting of preparations (feed additive preparations).



This voluntary tool, alongside the one launched earlier on for the identification of single substances, will continue facilitating businesses and authorities in their efforts to ensure compliance with the relevant regulatory requirements in the EU:

<http://www.fefana.com/MixtureClassificationTool/>

FEFANA's EU Code of Practice on voluntary labelling particulars (claims) for feed additives and premixtures

Claims on feed additives and premixtures are a common practice in the feed sector, while they are not referred to in Regulation (EC) 1831/2003 on additives for use in animal nutrition. FEFANA has decided to develop its Code in order to achieve a common approach amongst Feed Business Operators (FBOs), which can also be recognized by the authorities, to foster transparency, fair competition and predictability.

In order to ensure alignment along the European feed chain, FEFANA has taken into account other relevant codes of practice already in use; notably the "Code of good practice for the labelling of compound feed for food producing animals" developed jointly by FEFAC and Copa-Cogeca, and the "Code of good labelling practice for pet food" developed by FEDIAF. Complementarily to these documents, the FEFANA Code intends to improve the appropriateness of labelling and to bring a common understanding with regard to the rules applicable to voluntary labelling of feed additives and premixtures.

More information on the rationale and the process behind it, alongside the Code itself, is available at: <http://fefana.org/eu-legislation/tools/code-of-practice-claims/>

Publications and videos

Being the expert on Specialty Feed Ingredients and their Mixtures, FEFANA aims at providing technical and scientifically sound information on the benefits and safety of the products of its industry. In order to disseminate such knowledge, FEFANA has issued so far:

- Animated videos: FEFANA is working on a series of videos covering the benefits of specialty feed ingredients for current societal challenges, ranging from sustainability to animal welfare and the fight against

antimicrobial resistance. The latter has been launched at the beginning of 2021 and the upcoming ones will soon be available on the dedicated webpage: <https://fefana.org/info-centre/videos/>

- Factsheets: in the last few years FEFANA has published a series of thematic Factsheets on the benefits of specialty feed ingredients and on activities carried out within FEFANA's dedicated expert groups (e.g. revision of guidelines, organic farming, CLP-GHS)
- Booklets: FEFANA has published five booklets on different categories of products: Premixtures, Organic Acids, Carotenoids, Amino Acids, and Vitamins.

These and other publications are available on FEFANA's virtual info center at: <http://fefana.org/info-centre/publications/>

For more information please visit: www.fefana.org or contact us by e-mail at: info@fefana.org

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India

CLFMA

CLFMA OF INDIA is an Apex Chamber, nurturing "One Voice" of the Livestock Industry. It was formed in the year 1967 with the objective of helping the promotion of overall animal husbandry, including the promotion of the concept of balanced feeding of animals in accordance with their nutritional requirements for deriving from them maximum output through productivity improvement. It was broad-based to include members from all sectors of livestock production during 2002.

We have a membership base of around 250 members, representing Dairy, Aqua, Poultry, and others related to the Indian Livestock Industry viz. manufacturers and suppliers of feed additives, raw materials, feed plant and machinery, Laboratory equipment and breeders, integrators, meat processors and exporters, vaccine manufacturers, animal health, etc.

CLFMA Objectives:

1. To represent the Livestock Industry in various policy making forums related to Livestock Sector in India.
2. To provide information and education to the members and farming communities with a view to upgrade standards and performance levels of Livestock Sector to the potential.

3. To interface with scientific / other communities both within and outside the country to facilitate application of new scientific developments in the industry.
4. To provide a forum for interaction within the industry to learn and implement best practices amongst its members.

Thus, the broad objective has been to facilitate / enhance the contributions of the input providers and output processors to the development of Livestock Sector.

CLFMA Activities:

1. The feed manufacturers among our members have set up modern and efficient feed mills, with facilities for analytical testing of feed raw materials and finished feeds for providing quality assurance.
2. CLFMA has evolved standard specifications for compound feed for Cattle, Poultry and Pigs and for the purchase of feed raw materials, which should help in providing quality assurance to farmers.
3. CLFMA organizes / conducts National Symposia, Seminars and Orientation Courses at veterinary colleges, Farmer Workshops, and other educational programmes.
4. Encourages applied research- "CLFMA AWARDS" for the best research work in India.
5. CLFMA collects, classifies, and circulates Technical, Managerial and Statistical information, besides information on government policies – On line, latest news, and information on our website.
6. Makes representations to Central and State Governments and submits suggestions, thus providing a strong platform to voice of the industry before the Central and State Government.
7. CLFMA sponsors research / surveys and studies, which are necessary and helpful for the growth of Livestock Industry.

Indian Feed Industry:

The Indian Feed Industry is going through a phase which will set the direction for the next decade of Indian protein sufficiency. The Livestock sector provides about 6-6.5% to the GDP and total about 30% of the contribution to the Agricultural GDP. The Growth of the feed Industry is what we called as close to the Indian GDP number of 7-8% with a target to move up to 10% PA. The reasons attributed to this growth percentage has been the rise of Middle class with disposable Income, awareness about the dietary requirements and the overall rise in Population numbers. The feed industry is getting support from consumers in terms of market size moving higher but on the other hand there are challenges like:

- Industry Consolidation.

- Higher cost of Feed Raw Material cost.
- Import Export Policies and procedures.
- Country Protective policies.



In-spite of all these challenges India has managed to achieve fantastic results in terms of being:

- No-1 – In Milk Production
- No-2 – In Aquaculture Production
- No-3– In Fish Production
- No-3 – In Egg Production
- No-5 – In Broiler Production

SHARE OF AGRICULTURE & ALLIED AND LIVESTOCK SECTOR IN GVA

YEAR	GVA (TOTAL, IN RS CRORE)	SHARE OF AGRICULTURE & ALLIED IN GVA	SHARE OF LIVESTOCK IN GVA
2020-21	180,57,810	20%	6.2%

Source: Source: National Account Statistics-2022, Central Statistical Organization, GOI.

Indian Government Focus:

The Indian feed industry plays a crucial role in supporting the country's agriculture sector and ensuring food security. In recent years, the government has been putting a stronger focus on the development of the feed industry to improve the overall economy and promote sustainable agriculture practices. One of the key areas of government focus has been to increase the production of high-quality feed ingredients within the country. This is in line with the government's goal of achieving self-sufficiency in feed production and reducing reliance on imports. To support this, the government has launched various initiatives such as the National Livestock Mission, which aims to increase domestic production of feed ingredients and reduce the cost of animal feed. Another area of focus has been on promoting research and development in the feed industry. The government has established various research institutions and funded research projects to improve the quality and efficiency of feed production. This has resulted in the development of innovative and cost-effective feed formulations that have helped to increase the productivity of the agriculture sector.

Government Initiatives:

Animal Husbandry Infrastructure Development Fund:

The Animal Husbandry Infrastructure Development Fund (AHIDF) was

The Animal Husbandry Infrastructure Development Fund (AHIDF) was established as part of the Atma Nirbhar Bharat Abhiyan stimulus package with a corpus of US\$ 1.82 billion (Rs. 15,000 crore). The Animal Husbandry Infrastructure Development Fund (AHIDF) has been given permission to promote private businesses, MSME, Farmers' Producers Organisations (FPOs), and Section 8 companies investing in animal husbandry infrastructure to establish Dairy Processing and value addition.

A total of 6676 direct jobs have been created, and 1,00,000 farmers have benefited from 82 units, which includes Animal Feed Plants among others. To date, 95 projects have been funded. 61.56 lakh MT per year feed manufacturing capacity added to existing feed production capacity (Cattle Feed around 15.39 lakh MT per year, Poultry Feed around 46.17 lakh MT per year).

National Livestock Mission:

In 2014-15, the National Livestock Mission (NLM) was launched. With an emphasis on improving the supply of high-quality feed and fodder, risk management, efficient extension, improved credit flow, and livestock farmer/rearing organisations, among other things, this Mission was established with the aim of accomplishing the long-term development of the livestock industry. Through the following Sub-Missions, the scheme is carried out:

- **Sub-Mission on Feed and Fodder development:**

In-order to enhance the supply of certified fodder seed required for fodder production, the fodder seed chain must be strengthened. Additionally, through financial incentives, the development of fodder Block/Hey Bailing/Silage Making Units by entrepreneurs is encouraged.

- **Sub-Mission on Extension and Innovation:**

The purpose of the sub-mission is to encourage institutions, academic institutions, and companies that do research and development in the feed and fodder, sheep, goat, and pig industries, as well as extension programmes, livestock insurance, and innovation.

The CLFMA plays a crucial role in supporting the growth and development of the Indian feed industry. It provides a platform for feed manufacturers to come together, exchange knowledge and best practices, and address common issues and challenges. The association works closely with government bodies to represent the industry's interests and advocate for policies and regulations that foster its growth.

For further information on the CLFA visit: <https://www.clfma.org/>

Iran

IFIA

Iran Feed Industry Association, IFIA, based in Tehran, is Iran's largest organization devoted exclusively to representing the business, legislative and regulatory interests of the Iran animal feed industry and its suppliers. Founded in 2013, IFIA also is the recognized leader for international companies and provincial associations.

Members include 714 certified facilities including animal feed and feed Additive manufacturers, integrators, pharmaceutical companies, ingredient suppliers, equipment manufacturers and companies which supply other products, services and suppliers to feed manufacturers. The feed industry makes a major contribution to feed safety, nutrition and the environment, and it plays a critical role in the production of healthy, wholesome meat, milk, fish and eggs.

General services provided by IFIA:

- Consulting Services for Social Insurance
- Contract Affairs
- Legal Claims
- Tax consultancy
- Arbitration Center
- Ranking Centers

The report of the Iran Feed Industry Association was presented on Strategic Actions, Structural Measures, Major Studies, Research and Publication, and

the most important International Measures. Some guild activities are informed with the aim of developing and strengthening the share of animal feed industry, employment and the national economy.

X

Strategic Actions

- Setting up "Statistics and Economic Information Center" of Iran Animal Feed Industry
- Establishment of the "National Fund" to support the development of Animal Feed Manufacturers
- Providing "Guideline Document of Export Development" in Animal Feed Industry, 2019- 2022.
- Correction of the Export Tariffs of animal feed
- Setting up the Arbitration center for Iran Animal Feed Industry
- Prohibition of the production of animal feed in breeding units during a five-year period (more than 60% of feed production in breeding units)
- Allocation annual Useance for export of 500 thousand tons of Feed to the international customers especially 15 countries with common borders.
- Providing the scheme of reforming the distribution pattern of feed stuff in order to supply affordable financial resources in different rings of Protein supply chain in the country
- Correction of the import tariffs of Feed Stuffs
- Decreasing the tax exemption:
 - from 6% to 5% for Feed Mills
 - from 13% to 12% for importers.
 - from 4% to 3% for Wholesalers
 - from 11% to 10% for retailers.
- Reducing investment risk in Iran Animal Feed Industry
- Setting up the National Center for Ranking and Competitiveness in Animal Feed Industry
- Launching the Arbitration Center of Animal Feed Industry

Structural Measures

- Setting up a continuous communication system with the members through SMS, and social networks like WhatsApp and Telegram
- With the aim of informing the members, quick following up and correction the disruptive business issues, the unit of the surveillance of regulations and directives has been launched.

- Standardization of processes and consolidation of ISO 9001 in the IFIA
- Official Audit of 68 Feed Production units for issuing Export Code
- Holding 14 joint webinars with Iran Veterinary Organization (IVO) In order to improve the quantity and quality of feed production in Iran with various issues such as grain sampling, standardization of feed mills, etc.
- Participate in important international specialized events and webinars in the field of animal feed (companies and organizations), prepare and publish regular reports and informing members and followers on social networks.
- Holding 12 training courses of GMP in different cities of Iran for promoting the level of Feed Safety in Feed Production with participation of IVO, Ministry of Agriculture-Jihad representatives and the directors, QC and Technical managers of Feed Mills
- In order to promote public awareness and belief in the role of animal feed in sustainable development and increase the role of animal feed industry in production, employment and national income, IFIA over the past year has published specialized reports and posters in the field of animal feed, animal health and sustainability in feed production, as well as the importance of a healthy environment and biodiversity on its social medias such as Instagram, LinkedIn, etc.
- Signing a memorandum of cooperation with the Standard Research Institute to hold operational training courses
- Signing a memorandum of cooperation with the Vice-Presidency for Science and Technology with the aim of supporting high-tech and knowledge-based companies with a focus on the production of feed additives and supplements.

Major Studies, Research and Publication

- Publishing the book of "Iran a new Era" 2019,2020 version
- Translating and publishing Fao's book called: Good practices for the feed sector.
- Running the second national competitions for successful experiments and Benchmarking in Animal Feed industry, with the aim of encouraging feed manufacturers to share their successful experiences.

The most important International Measures

- Holding two annual meetings with the presence of members of parliament, all deputies of the Ministry of Agriculture and the Ministry of industry, mine and trade and heads of specialized organizations on animal feed.

The most important steps taken by Iran Veterinary Organization in relation to the Animal Feed Manufacturers Units

X

Assessment of documents for approval of importing raw materials and Ready- to- Feed for livestock, poultry and aquaculture:

Aquaculture Feed: 37 facilities

Pet Feed (Dog, Cat, Birds, etc...): imports banned.

Livestock Feed (Milk Powder) 21 facilities

Feed Ingredients (Concentrate, Fat Powder, Gluten, etc...) 97 facilities

Participate in scientific-specialized working groups

Specialist working groups of Livestock, Poultry and Aquaculture Feed: 28 cases

Feed Technical Committees: 9 cases

National Standards Organization meetings: 31 cases

Working Group of Residue (for animal feed use): 18 cases

State of Iran Compound Feed in 2019,20

In 2020, 714 feed mills manufactured 10.5 Million tons of animal feed, of which 6000 thousand tons cattle feed, 4000 thousand tons poultry feed, 400 thousand tons Aquaculture feed and 100 thousand tons other animal's feed.

According official statistics of Agriculture-Jihad Ministry, total amount of required feed ingredients is 85656 thousand tons. The highest required ingredient of wheat and barley bran is 15168 thousand tons, and the lowest required input of feed wheat is 920 thousand tons.

FEED PRODUCTION BY TYPE IN 2019 AND 2020 WITH CONSIDERING OF 5% CALCULATION ERROR (1000 MECTRIC TONS)

	2019	2020
Feed Mills	645	714
Cattle & Dairy Feed	5,645	6000
Poultry Feed	3,960	6,000
Aqua Feed	291	400
TOTAL	9,896	10,400

Source: Iran Feed Industry Association

REQUIRED ANIMAL FEED INGREDIENTS IN 2020 (1000 TONS) WITH CONSIDERING OF 5% CALCULATION ERROR (1000 METRIC TONS)

FEED TYPE	METRIC TONS (1000)
Feed Corn	10,760
Feed Wheat	920
Feed Barley	6,618
Soybean Meal	4,550
All Types of Meal	3,655
Alfalfa	7,697
Forage Corn	12,809
Sorghum and Millet	3,736
Wheat and Barley Bran	15,168
Rice and Barley Bran	2,348
Pasture Forage	9,450
Agricultural and Industrial Waste	7,945
TOTAL	85,656

Source: Iran Feed Industry Association

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Japan

JFMA

The Japan Feed Manufacturers Association (JFMA) was established in 1957 as a cooperative to contribute to the development of Japanese feed and livestock industry.

JFMA has 43 member companies and 68 feed plants as of 01 April 2023, which produce formula and mixed feed in Japan.

JFMA's total feed production by member companies was 16.1 million tons (0.9% decrease from the previous fiscal year), and Japanese total formula and mixed feed production was 24.1 million tons (0.7% decrease from the previous fiscal year) in 2022.

JFMA's Activities

Industry Representation and Collaboration

As representatives of feed manufacturers and related companies, we collaborate with the government and the relevant domestic organizations to protect the industry's interests and promote its development. We also collaborate with the international organizations to exchange information and monitor regulatory trends.

Information Provision and Awareness Campaigns

We provide information and carry out awareness campaigns regarding the feed industry. We provide member companies with information on regulatory and legislative changes, market trends, technological innovations, and work

on to enhance industry awareness and competitiveness.

Establishment of Standards and Regulations

We take part in the establishment of quality standards, safety standards, and regulations for feed. We develop standards and regulations for feed with safety and environmental consideration and promote compliance across the industry.

Problem Solving and Consultation

We collaborate with member companies and relevant organizations to seek solutions to issues and challenges the feed industry faces. We also serve as a consultation point for member companies and the general public.

We are relying imported feed ingredients.

Feed supply in Japan relies on imports for most of feed grains such as corn, sorghum, barley, wheat, which total 13,266 thousand tons a year.

Corn imported mainly from the United States and Brazil, accounts for 46.7% of formula and mixed feed material. Second largest is soybean meal (12.7%), the third is rice (5.6%).

Accordingly, substantial increase in manufacturing cost caused by price hike of corn and other imported feed materials, as well as high freight rates and weaker yen against US dollar, has been causing negative impact only both livestock and feed business in Japan.

Fights against infectious animal diseases.

Since September 2018, Japan has been suffering from an outbreak of classical swine fever, and the Japanese government began vaccinating pigs in October 2019. However, there are still sporadic outbreaks of classical swine fever on farms, and wild boars infected with swine fever the found throughout "Honshu" the main island of Japan. There is no case of African swine fever reported in Japan, but it has very widely spread from China and other South-East Asian countries to South Korea, a neighboring country of Japan although separated by the sea. Our animal hygiene authorities and the related industries are on their highest alert, and the members of JFMA have been taking tightest sanitary measures on their plants.

In the past some winter seasons, avian flu carried by migratory birds was also a source of threat. Last winter, the disease broke out on 84 farms, and 17.52 million birds were destroyed.

Our initiatives to pursue sustainability and environmental goals.

In the last decade, the use of domestically produced rice as an ingredient for compound feed to replace imported corn has taken root under the government's supportive measures to promote the diversification of rice

production. Such development of new market for domestic rice not only contributes to land conservation and regional revitalization by preventing the abandonment of paddy fields in economically and socially declining country side, but also curbs greenhouse gas emissions by shortening the transportation distance.

We are also making technical efforts to produce low phosphor and low nitrogen feed to lead to smaller release of these substances in the environment.

Recycling use of food by-products under appropriate sanitary control is another initiative taken by our feed industry to encourage effective use of limited resources and reduction of environmental burdens.

Number of farms raising livestock

As of February 1st 2022, number of farms raising dairy cattle was 13,300 (decreased by 4.0%), and number of heads of dairy cows was 1.371 million (increased by 1.5%).

Number of farms raising beef cattle was 40,400 (decreased by 3.6%), and number of heads was 2.614 million (increased by 1.1%).

Number of farms raising pigs was 3,590 (decreased by 4.0%), and number of heads was 8.949 million (increased by 3.4%).

Number of farms raising layer was 1,880 (decreased by 4.0%), and number of birds was 18.266 million (decreased by 0.4%).

Number of farms raising broilers was 2,100 (decreased by 2.8%), and number of birds was 139.23 million (decreased by 0.3%).

The overall trend in recent years is that retirement of many small-scale household business has led to increase in the scale of average farms.

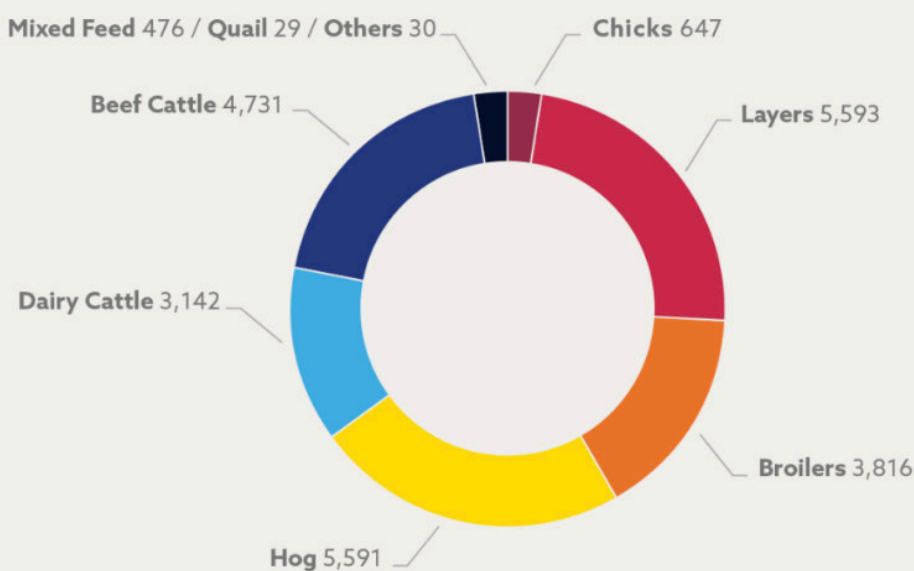
Household business has led to increase in the scale of average farms.

PRODUCTION OF FEED IN JAPAN 2019-2022 (1,000TONNES, APRIL-MARCH)

FEED TYPE	2019	2020	2021	2022
Chicks	679	668	683	647
Layers	5,813	5,699	5,666	5,593
Broilers	3,859	3,816	3,847	3,816
Hog	5,641	5,772	5,659	5,591
Dairy Cattle	3,034	3,078	3,161	3,142
Beef Cattle	4,520	4,569	4,631	4,731
Quail	31	29	28	29
Others	30	31	31	30
Mixed Feed	531	537	526	476
TOTAL	24,138	21,149	24,232	24,055

Source: MAFF (Ministry of Agriculture, Forestry and Fisheries)

PRODUCTION OF FEED IN JAPAN IN 2022 (1000 TONNES)



Source: MAFF (Ministry of Agriculture, Forestry and Fisheries)

FEED INGREDIENTS USED IN COMPUND & MIXED FEED APRIL 2022 TO MARCH 2023 (1000 TONNES)

FEED INGREDIENT	QUANTITY (1000 TONNES)
Corn	11,236
Sorghum	233
Wheat	483
Barley	958
Feed Rice	1,358
Wheat Flour	180
Other Grains	133
Soybean Meal	3,062
Other Oil Meals	1,208
Other Beans	2
Chaff and Brans	2,453
DDGS	436
Alfalfa	95
Animal by-products	348
Others	1,861
TOTAL	24,046

Source: MAFF (Ministry of Agriculture, Forestry and Fisheries)

For more information please visit: www.jafma.or.jp.

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Latin America & Caribbean

FEEDLATINA

FEEDLATINA: The Latin American and Caribbean Feed Industries Association, is based in Uruguay is recognized as an important voice and focal point on regulatory issues in the animal nutrition sector.

Feedlatina works to promote increased dialogue between the feed industry and regulatory agencies and is based on a further sharing of responsibilities between them in order to promote compliance with technical and commercial regulations " Co Regulation". We act as a mediator with Official Bodies to promote the development, harmonization and maintenance of the regulatory frameworks that guarantee free trade in the animal nutrition market, based on quality, safety and food security.

Feedlatina implemented its STDF/PG/345: Feed and Food Security Program, A project for regulatory harmonization and feed safety in Latin America and the Caribbean. The STDF/PG/345 program was supported by the Standards and Trade Development Facility (STDF) a global partnership that supports developing countries in building their capacity to implement international sanitary and phytosanitary (SPS) standards, guidelines and recommendations as a means to improve their human, animal, and plants health status to gain or maintain access to markets. And after the completion of the project, we continued with our daily work of regulatory harmonization and institutional strengthening to promote food security and production sustainability. We produce and disseminate informative material and promote the education and credibility of the animal feed sector in our region.

At the moment, Feedlatina works concurrently with 3 technical work groups, with the participation of the associates.

The technical group on additives seeks Harmonization of the Definition and Classification of Food Additives, as well as Harmonization of Labeling, and its objective is to prepare a guide, so that the different Latin American countries can consult it when they are revising or creating new legislation referring to the requirements for registration of additives, or whenever they deem necessary and opportune.

The development of new technologies requires a long time of research and high investment. The purpose of the harmonization or of the guide itself is to ensure that companies develop new technologies to meet the new requirements of the world, such as, for example, the use of more sustainable products in animal production and that it is guaranteed that this new technology can be used, classified and indicated according to the purpose for which it was created. We are in the final phase of the project, preparing the last version of the document that has already been reviewed by the authorities of the countries involved (Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Uruguay) and we will present the finalized document later this year, 2023.

Feedlatina also has a Technical Samples Group whose objective is to survey the procedures for requesting product samples for registration and/or renewal of registration in the main countries of the region and suggest to the authorities improvements in processes, making them faster and less expensive. costly to companies and consequently generating and encouraging greater trade between them.

Through its Technical Statistics Group, it reviews, monitors and evaluates the production, import and export numbers of the animal nutrition market in its region, always being up-to-date and ahead of every macro scenario in which it operates.

In addition to these 3 groups, Feedlatina opens a new group whenever necessary, such as specific groups to discuss suggestions for a specific legislation placed in public consultation by a country. Thus, we give strength and support to our associates by sending suggestions through the association.

We participate in symposiums and annually organize the Latin American Workshop on Animal Nutrition Regulatory Affairs, in addition to several meetings between the Official Regulators of the countries and private partners to foster their relationship.

In 2022, Feedlatina organized and promoted the II Latin American Workshop on Animal Nutrition Regulatory Affairs, in Mexico City, which had a significant

presence of its associates and officials from 11 countries, where updates to the respective legislation and issues relevant to the smooth running of trade between countries.



In 2023, the III Latin American Workshop on Animal Nutrition Regulatory Affairs takes place in Chile Santiago and again has a well-designed and interesting agenda, integrating the public and private sectors.

Today Feedlatina is consolidated as a permanent regional and International Space for Public and Private cooperation in the field of animal nutrition. We give support and negotiate in regulatory matters with the different regulatory agencies and support for trade facilities between countries and economics blocs. We are in constant contact with the government agencies of the Latin America and Caribbean countries through their Ministries and Services of Agriculture, Livestock and food safety, which support the association and allow it to be updated on legislation and actual information. Such as Statistical data of Latin America Market, national production and foreign trade between the countries.

The Association seeks to strengthen the imagen of Latin America and Caribbean to the consumers and enable developing countries to join forces and strengthen their representation.

The integration between the countries of the region and the region with the world, facilitating trade of Latin America Bloc.

Feedlatina will continue working to support a robust, integrated and strong Latin America.

FEEDLATINA - ESTIMATE OF PRODUCTION OF FINISHED FEED [1,000T] / 2022

X

COUNTRY	TOTAL	POULTRY	PORK	CATTLE	PET	AQUA
Brazil	82,056	42,600	20,600	12,150	3,720	1,488
Mexico	39,472	18,698	6,670	10,552	1,388	393
Argentina	18,598	6,978	2,882	7,837	760	4
Colombia	10,360	6,737	1,692	881	499	1,559
Chile	7,484	2,619	1,797	700	412	1,559
Peru	6,231	5,278	953	—	—	—
Ecuador	4,080	1,666	699	67	110	1,538
Uruguay	3,288	326	42	2,700	135	—
Bolivia	2,327	1,751	576	—	—	—
Guatemala	2,037	1,835	202	—	—	—
Venezuela	1,878	1,477	401	—	—	—
Rep. Dominica	1,673	1,385	288	—	—	—
Costa Rica	1,281	575	267	306	69	45
Paraguay	999	602	271	112	4	—
Honduras	823	766	58	—	—	—
Panamá	796	590	206	—	—	—
El Salvador	605	533	72	—	—	—
Nicaragua	474	410	64	—	—	—
Cuba	175	85	90	—	—	—
TOTAL	184,579	94,912	37,829	35,306	7,047	5,349

Production estimate for 2022.

FEEDLATINA estimates - in absence of official/association source. The estimates were based on information from producers of the respective countries, FAOSTAT and Feedlatina companies operating in the Latin American market.

FEEDLATINA - ESTIMATE OF PRODUCTION OF FINISHED FEED FOR POULTRY [1,000T] / 2022

X

COUNTRY	TOTAL	BROILERS	LAYERS
Brazil	42,600	35,750	6,850
Mexico	18,698	11,259	7,439
Argentina	6,978	4,541	2,032
Colombia	6,737	4,214	2,162
Peru	5,278	3,634	1,327
Chile	2,619	1,456	643
Guatemala	1,835	1,059	678
Bolivia	1,751	1,323	316
Ecuador	1,666	1,041	530
Venezuela	1,477	963	429
Rep.Dominicana	1,385	806	352
Honduras	766	445	280
Paraguay	602	411	105
Panamá	590	448	105
Costa Rica	575	317	222
El Salvador	533	342	161
Nicaragua	410	326	56
Uruguay	326	179	131
Cuba	85	12	70
TOTAL	94,912	68,526	24,090

Production estimate for 2022.

FEEDLATINA estimates - in absence of official/association source. The estimates were based on information from producers of the respective countries, FAOSTAT and Feedlatina companies operating in the Latin American market.

FEEDLATINA - ESTIMATE OF PRODUCTION OF FINISHED FEED FOR CATTLE [1,000T] / 2022

X

COUNTRY	TOTAL	DAIRY	BEEF
Brazil	12,150	6,200	5,950
Mexico	10,552	6,188	4,364
Argentina	7,837	5,524	2,313
Uruguay	2,700	950	1,750
Colombia	881	—	—
Chile	700	—	—
Costa Rica	306	—	—
Paraguay	112	—	—
Ecuador	67	—	—
TOTAL	35,306	18,862	14,377

Production estimate for 2022.

FEEDLATINA estimates - in absence of official/association source. The estimates were based on information from producers of the respective countries, FAOSTAT and Feedlatina companies operating in the Latin American market.

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New Zealand

NZFMA

The New Zealand Feed Manufacturers Association (NZFMA) represents the interests of almost all the animal feed manufacturing companies in New Zealand. Manufacturers and blenders of compound feeds, premixes and dietary supplements are amongst our member companies. The majority of feed is produced for the intensive livestock industries (poultry and pig), however feed is also produced for the ruminant and equine industries. A small amount of feed is also produced for animals such as dogs, emus, rabbits and fish

Annual Feed Production Statistics for the Year Ending December 2020

These statistics report total tonnage of manufactured animal feed and total tonnage of raw materials used in feed production. This report does not include blended feed.

These statistics now include the breakdown of species-specific data for feed production.

Please note all figures reported in the tables below in this Executive Summary are in metric tonnes (unless otherwise specified).

FEED PRODUCTION 2022 (METRIC TONNES)

	NORTH ISLAND (738,570)		SOUTH ISLAND (390,404)	
	BULK	BAGGED	BULK	BAGGED
	654,618	83,952	328,660	61,744
TOTAL	1,128,973			
SAME PERIOD LAST YEAR	1,103,170			
% CHANGE	2.34			

Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

RAW MATERIAL USE 2022 (METRIC TONNES)

RAW MATERIAL	NORTH ISLAND	SOUTH ISLAND	TOTAL	SAME PERIOD LAST YEAR	% CHANGE
GRAINS					
Wheat	319,357	175,345	494,703	387,291	28
Maize	67,135	1,666	68,801	117,277	-41
Barley	40,053	63,677	103,731	116,202	-11
GRAINS BY PRODUCTS					
Wheat	39,540	19,930	59,470	54,154	10
ANIMAL PROTEIN					
Meat and Bone Meal (non-poultry)	17,279	11,335	28,614	26,125	10
PLANT PROTEIN					
Soya Meal	115,146	42,998	158,144	133,453	19

Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

PALM KERNEL IMPORTS 2022 (METRIC TONNES)

NORTH ISLAND	SOUTH ISLAND	TOTAL	SAME QUARTER LAST YEAR	% CHANGE FROM PREVIOUS YEAR
1,376,157	597,592	1,973,749	2,139,286	-7.7

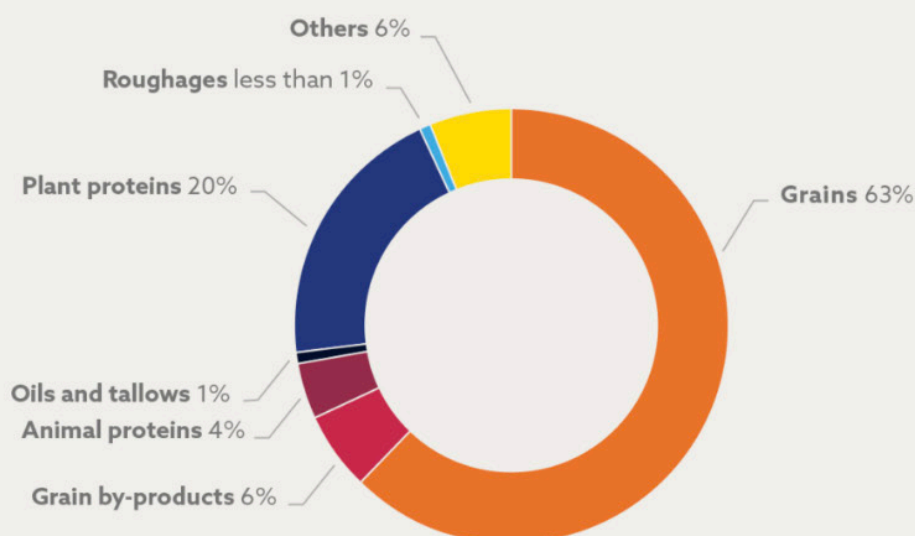
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

SPECIES SPECIFIC DATA 2022 (METRIC TONNES)

SPECIES	NORTH ISLAND	SOUTH ISLAND	TOTAL	% CHANGE FROM PREVIOUS YEAR
Poultry - Meat	424,744	95,658	520,402	1
Poultry - Layer	121,521	47,899	169,420	-2
Pig	36,315	126,040	162,355	5
Calf	52,678	32,584	85,262	1
Dairy	76,936	58,125	135,061	10

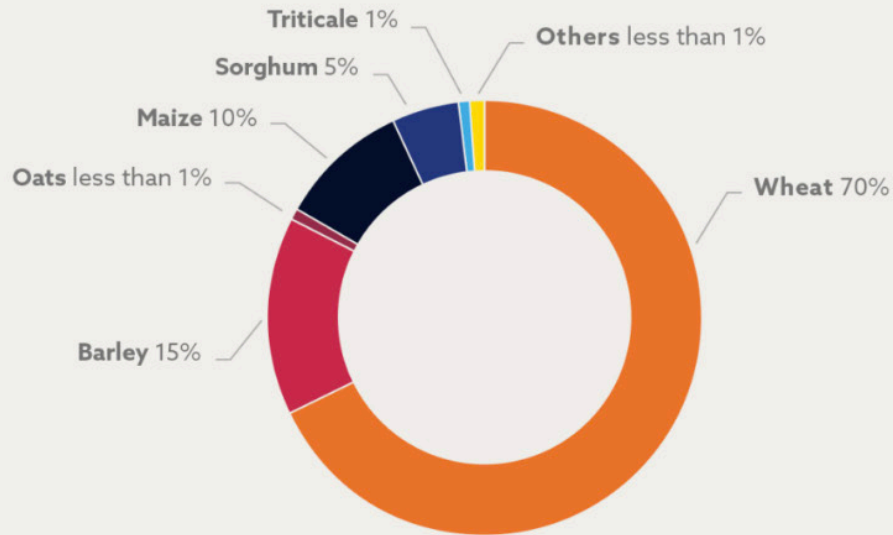
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

USAGE OF RAW MATERIAL CATEGORIES IN NEW ZEALAND 2022 (% OF TOTAL)



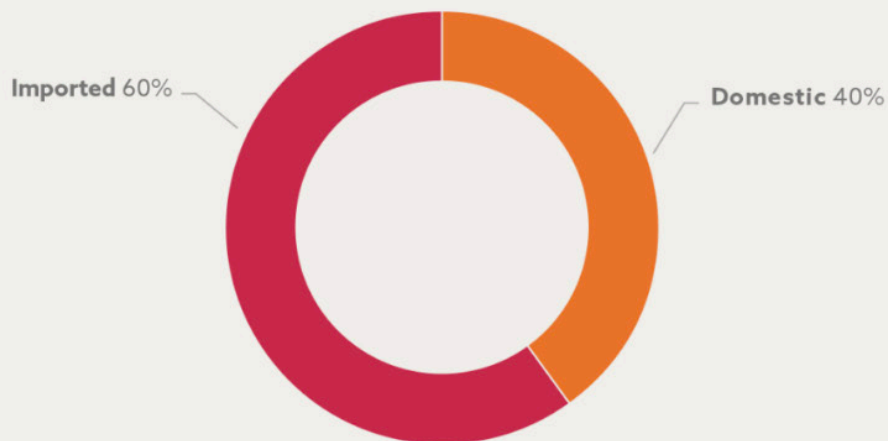
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

GRAIN USAGE IN NEW ZEALAND 2022 (% OF TOTAL)



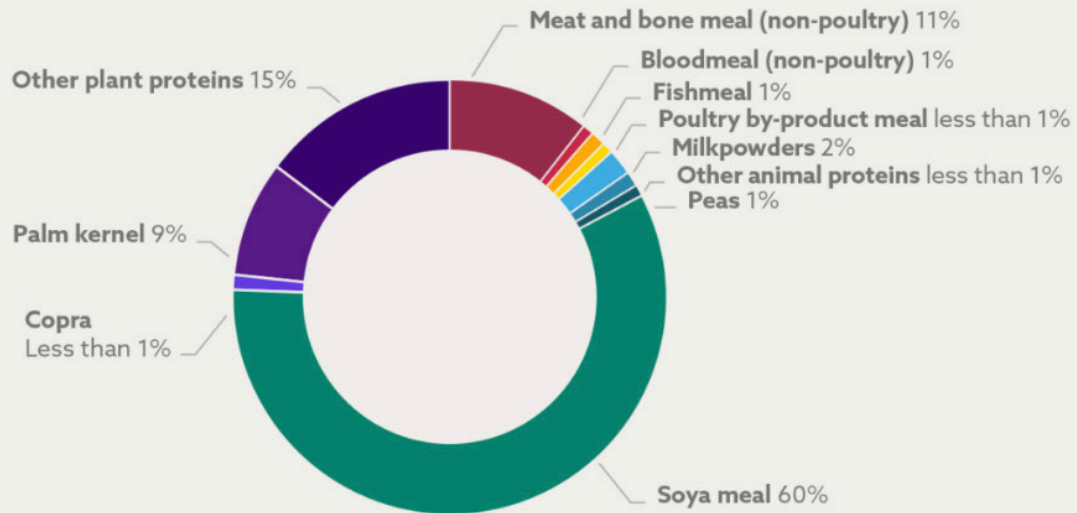
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

GRAIN SOURCES – DOMESTIC VS IMPORTED 2022 (% OF TOTAL)



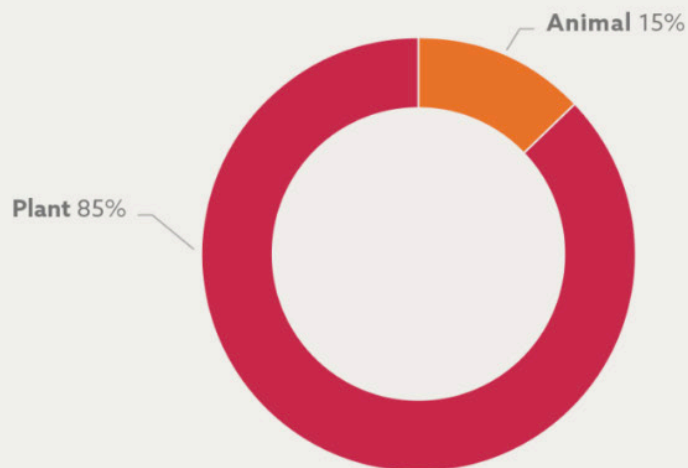
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

PROTEIN USAGE IN NEW ZEALAND 2022 (% OF TOTAL)



Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

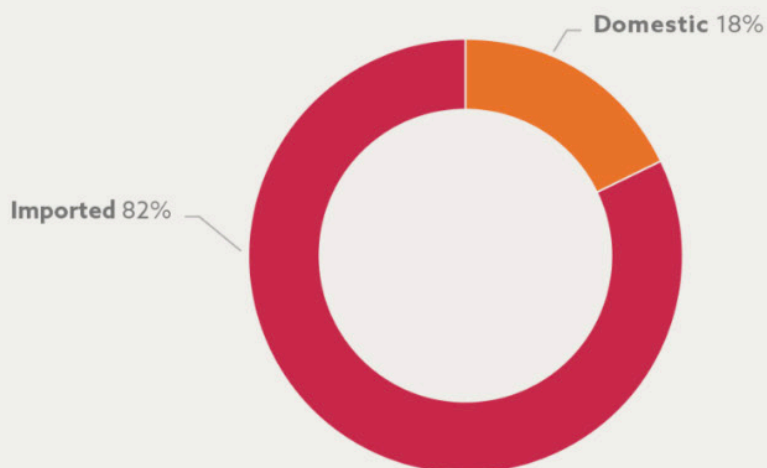
PROTEIN SOURCES – ANIMAL VS PLANT PROTEINS 2022 (% OF TOTAL)



Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

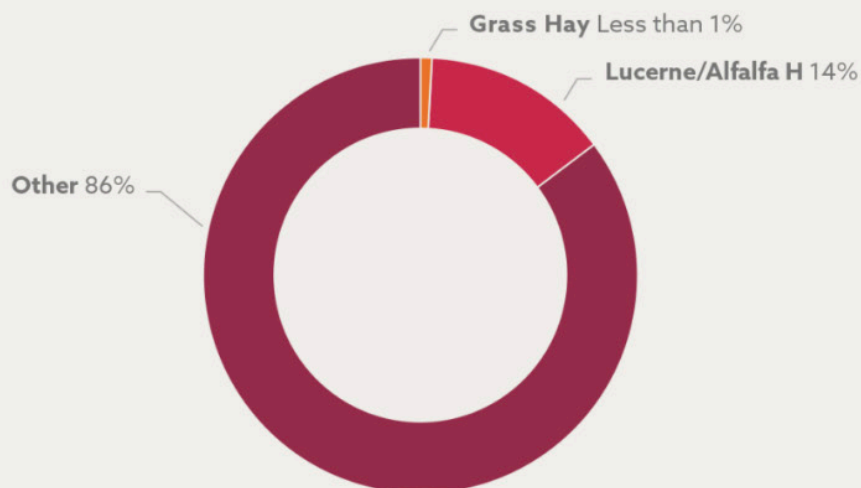
PROTEIN SOURCES – DOMESTIC VS IMPORTED 2022 (% OF TOTAL)

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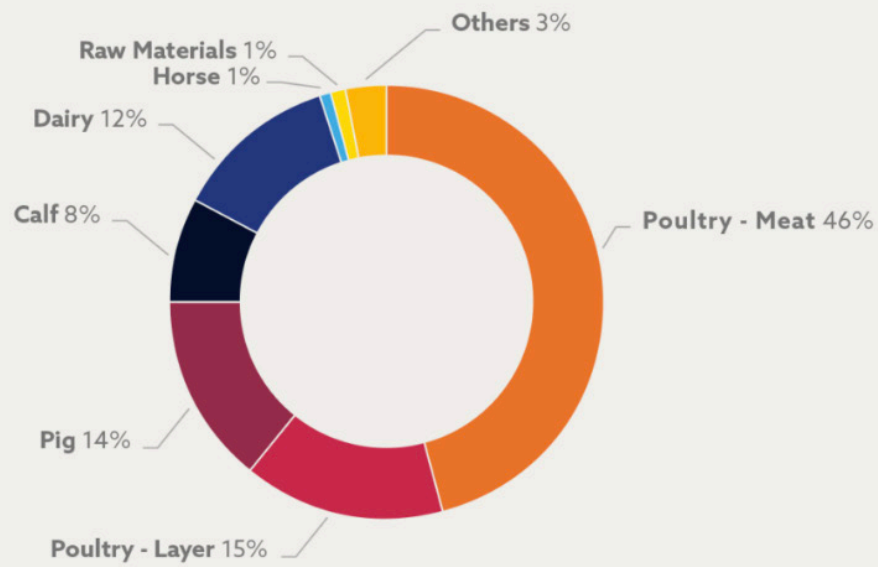
Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

ROUGHAGES USED IN NEW ZEALAND 2022 (% OF TOTAL)



Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

FEED PRODUCTION BY SPECIES 2022 (% OF TOTAL)



Source: New Zealand Feed Manufacturers Association Annual Feed Statistics Reports

For more information please visit: www.nzfma.org.nz.

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South Africa

AFMA

The Animal Feed Manufacturers Association of South Africa (AFMA) is the official industry representative trade organisation for the formal compound feed manufacturers of South Africa, producing the full range of animal feeds in the larger agricultural arena. This report covers activities during the reporting period 2021-22.

The Global Macro-economic Environment

The year 2021 ended with a promise of a potential recovery of the global economy, with the International Monetary Fund (IMF) forecasting global growth of 4,9% in 2022, following a solid recovery of 6,1% in 2021.

However, this picture quickly changed when Russia invaded Ukraine, disrupting global value and supply chains and causing a sharp increase in oil, fertiliser, and agricultural commodity prices. This further raised concerns about inflationary risks in the developed world and the long-persistent impact of COVID-19 and monkeypox, which had continued to disrupt the value and supply chains, specifically in Asia, where there were still hard lockdowns in much of this year.

The IMF forecasted global growth at 3,2% (revised down from the previous estimate of 4,9%). The economy is likely to remain depressed through 2022/23, as the IMF places global growth at 2,9% for the year. Several shocks will continue to weigh on the global economy, such as; higher-than-expected inflation worldwide – especially in the United States and major European economies – triggering tighter financial conditions; a worse-than-anticipated slowdown in China, reflecting COVID-19 outbreaks and lockdowns; and

further negative spillovers from the war in Ukraine.

REAL GDP GROWTH

GDP (%)	2021	2022	2023
Global	6.1	3.2	2.9
Advanced Economies	5.2	2.5	1.4
Emerging Market and Developing Economies	6.8	3.6	3.9

Source: International Monetary Fund

Central banks worldwide were adamant about controlling inflation and ensuring inflation expectations remained anchored to their targets. Thus, their credibility had to be rebuilt following their misdiagnosis of the recent surge in inflation as temporary. Effectively, central banks accepted that if the economy finds itself in a recession due to their policy actions to bring inflation under control, so be it. Peak interest rates in the seven largest advanced economies were expected to be reached by September 2023, which implied that consumers and businesses could expect some tough times with higher interest rates over the next six to 18 months.

In fact, the developed economies slowed to 2,5% growth in 2022 (from a pre-war estimate of 4,4%) and 5,2% in 2021. In 2023, the developed economies were expected to underperform, estimated to grow at 1,4%. The United States, Euro Area, UK, and Canada were among the economies that were underperforming due to the shocks discussed. A slowdown in the developed world meant a decline in the demand for goods and exports from emerging markets. Such conditions will probably weigh down export-oriented economies such as South Africa.

The IMF forecasted growth in emerging and developing Asia at 4,6% in 2022 (from pre-war estimates of 5,2%) and 5,0 in 2023. This was a far better slowdown than observed in the developed world. The Asian economies and Saudi Arabia in the Middle East and Nigeria in the Sub-Saharan region were among the leading countries in this anticipated solid recovery. The higher oil prices have improved their income in the latter two countries, Saudi Arabia and Nigeria.

Inflation Rates

Inflation was and still is an important topic in the global financial world. There are several factors behind this surge in inflation.

Firstly, the disruptions in the supply chains during the COVID-19 intense period and the increased shipping costs were the core challenges leading to an uptick in global inflation.

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Secondly, through unemployment wages and various forms, the economic stimulus in 2021 and partly in 2021 in the advanced economies such as the United States, Germany, United Kingdom, and other countries have increased consumer spending. This, in turn, has led to an uptick in consumer price inflation which in 2021 and into 2022.

Thirdly, the war in Ukraine further exacerbated the supply chain glitches and an increase in the oil and food process, thus pushing up inflation across the world. The World Bank forecasted consumer price inflation in the advanced economies at 6,6% y/y in 2021, a notable acceleration from 3,1% y/y in 2021.

CONSUMER PRICE INFLATION FORECASTS

YEAR-ON-YEAR (%)	2021	2022	2023
Advanced Economies	3.1	6.6	3.3
Emerging Market and Developing Economies	5.9	9.5	7.3

Source: International Monetary Fund

In the emerging economies, there was an uptick in inflation, partly driven by increased food and energy prices, directly linked to the Russia and Ukraine war. The available data showed that consumer price inflation for the emerging markets accelerated to around 9,5% y/y in 2022, from 5,9% y/y in the previous year. The forecasts for 2023, however, show moderation to 7,3% y/y from 2022 (compared to 4,5% y/y in 2021) and accelerate further slowdown to 5,7% in 2023.

Unemployment

The business environment has changed since the start of the COVID-19 pandemic. The income support to households in the developed world incentivised people to stay out of work, especially work that was typically in undesirable conditions. But this income stimulus stopped at the end of 2021 in most countries. Still, the population had devised other means of self-employment when there was a boost in household incomes. This meant that countries like the United States struggled to find workers for various low-income jobs. In other countries, the increasing living costs, as reflected by the rising inflation, have persuaded people back to the labour market. Still, some

struggled to find work, especially in strained economies and experiencing low growth. It is for these reasons that unemployment across the world remained at pretty high levels.

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UNEMPLOYMENT RATE TRENDS (%)

	2021	2022	2023
Global	6.2	5.9	5.7
Upper-Middle-Income-Countries	6.7	6.6	6.3
Low-Income Countries	5.9	6.0	5.7

Source: International Monetary Fund

Local Macro-economic Conditions

On the domestic front, South Africa was one of the countries most hard hit by the COVID-19 pandemic and the disruptions in supply chains. However, during 2021, as the domestic economy opened, it promised a recovery, with the economy growing at 4,9%. As a small open economy, global economic developments tend to hit the South African economy the hardest. As such, South Africa experienced a continuous slowdown to 2,3% in 2022 and is expecting 1,4% in 2023.

These global shocks occurred in an environment where there were already several challenges, such as the slow-paced implementation of economic reforms outlined by the National Development Plan and, more recently, in the National Treasury paper in 2019. The electricity outages, inefficiency in the rail network, poorly maintained roads and water infrastructure, and non-performing municipalities were some of the issues that continue to constrain business activity and, thus, growth in the South African economy.

The growth mentioned above implied that the South African economy couldn't create sufficient jobs for its working population over the foreseeable future. Hence, the country will be trapped in an environment of low growth, high unemployment, and inequality for some time. Such conditions could lead to social discomfort across communities, subsequently impacting business activity. An example of a manifestation of severe discomfort in the social society was experienced during the July 2021 social unrest in KwaZulu-Natal, which gave the nation a glimpse of the potential risk as a result of the underperformance of the South African economy and reluctance to implement reforms by the political leadership.

South African Inflation

South African Inflation

This elevated inflation path led to a sharp increase in interest rates since the start of 2022. The South African Reserve Bank is expected to keep interest rates elevated over the next coming year as the Bank tries to control inflation through Monetary Policy instruments. The expected moderation in inflation to 5,7% in 2023 assumes an environment of elevated interest rates to bring inflation below its upper bound of 6,0% (the lower bound is 3%).

South African Unemployment

In the local South African market, the official data from Statistics South Africa showed a positive increase in jobs, a 7% year-on-year improvement in primary agriculture jobs to 844 389 jobs in the first quarter of 2022. This was well above the long-term agricultural employment of 780 000. The increased farm activity during the replanting process, combined with the decent deciduous fruit harvest, supported employment. Other subsectors, such as livestock, also contributed to employment. The subsectors that shaved employment during this period were forestry and aquaculture (ocean, coastal fishing, and fish farms).

The livestock and wool industries, confronted by rising feed costs and foot-and-mouth disease outbreaks leading to an export ban, are in uncertain territory and worth close monitoring.

SOUTH AFRICA'S AGRICULTURAL JOBS (1000 JOBS)



Source: Stats SA and Agbiz Research.

Most subsectors in agriculture faced general challenges around the

inadequate functioning of network industries and infrastructure – roads, rail, ports, water, and electricity, and poorly functioning municipalities, leading to increased business costs. Moreover, the challenging economic conditions in the country have, in some areas, led to labour unrest, which also requires a close eye. Still, one can be optimistic about agriculture's ability to provide employment even in these challenging times.

Global Grains and Oilseeds Outlook

The International Grains Council (IGC) forecasted 2021/22 global grains production at 2,3 billion tons, down by 2.9% from the previous season. This decline in harvest is mainly due to expected lower yield in Ukraine, the US, and Euro Area, amongst other regions. From a commodity perspective, maize and wheat are the key drivers of the potential decline in global grain production. And thus, the global grains stocks could fall during the period under review to an estimated 598 million tons, a 1% annual decline. This would result from both reductions in production and firm consumption levels. These dynamics added upward pressure on grain prices over the medium term. Still, the grain prices are expected to come off the levels seen after Russia invaded Ukraine when there was anxiety in the market.

GLOBAL GRAINS AND OILSEEDS SUPPLY AND DEMAND 2019-2023



Source: International Grains Council and Agbiz Research

Maize

The IGC forecasted the 2021/22 global maize production at a new peak of 1,2 billion tons, up 7.5% from the previous season. This is because of an expected deterioration in the harvest in the United States, Ukraine, Euro Area, and India. While production was anticipated to increase, the consumption of maize could remain firm at 1,2 million tons, with an estimated 722 million tons earmarked for feed use, while the rest for food and industrial use.

This means that the global maize stocks could stabilise, set at an increase of

1.4% year-on-year, estimated at 284 million tons. As such, global maize prices could remain elevated over the foreseeable future, although at much lower levels than months after Russia invaded Ukraine. The animal feed industry will likely remain under pressure at such times, as prices are unlikely to decline back to the 2019 levels.

Wheat

Moreover, the IGC forecasted the 2021/22 global wheat production at 780.9 million tons, up 1% from the previous season. Meanwhile, global wheat consumption is expected to remain firm, mildly up 1.4% from the 2020/21 season and estimated at 772 million tons.

The animal feed share in this global wheat consumption is forecast at 148 million tons. This volume is not all that different from the previous seasons. The rest is for food and industrial use. The decline in broad global harvest is underpinned by expectations of a poor crop in some regions of the Euro Area, Australia, Ukraine, Argentina, China and India. Due to increased production, the 2021/22 global wheat stocks are forecast at 274 million tons, down by 1.08 % from the previous season. This stock decline is another factor that could keep wheat prices somewhat elevated compared with the levels seen in 2019. However, the prices will likely fall from the levels seen months after Russia invaded Ukraine, a major wheat producer.

Soybean

Soybean is the only crop whose production forecasts are pretty robust. For example, the 2021/22 global soybean harvest is set to decline to 356.4 million tons, down 3.8 % year-on-year, while the 2022/23 estimates show an expansion of 3.5 % towards 369 million tons. The growth in plantings in the United States, combined with an expected increase in area plantings when the season starts in Brazil, Uruguay, and Argentina, are driving this expected large crop. However, one should keep the potential La Niña-induced dryness in South America and the heatwave in the United States in mind.

The 2021/22 soybeans global stocks will amount to 45.1 million tons, down by 18% from the previous season. To illustrate the robustness of the Soybean market. Estimates for 2022/23 indicate an expected 50.2 closing stock due to the expected expansion discussed. Such an improvement would pressure soybeans and their product prices across the vegetable oils market. The next few months will be vital for assessing whether this optimistic picture will hold or change.

Domestic Grain and the Oilseeds Outlook

Maize

South Africa's 2021/22 summer crops yielded yet again another excellent

season. The Maize Crop delivered 15.38 million tons after an earlier estimate of 14,71 million tons in July. About 7,78 million tons are white maize, with 7,6 million tons being yellow maize.

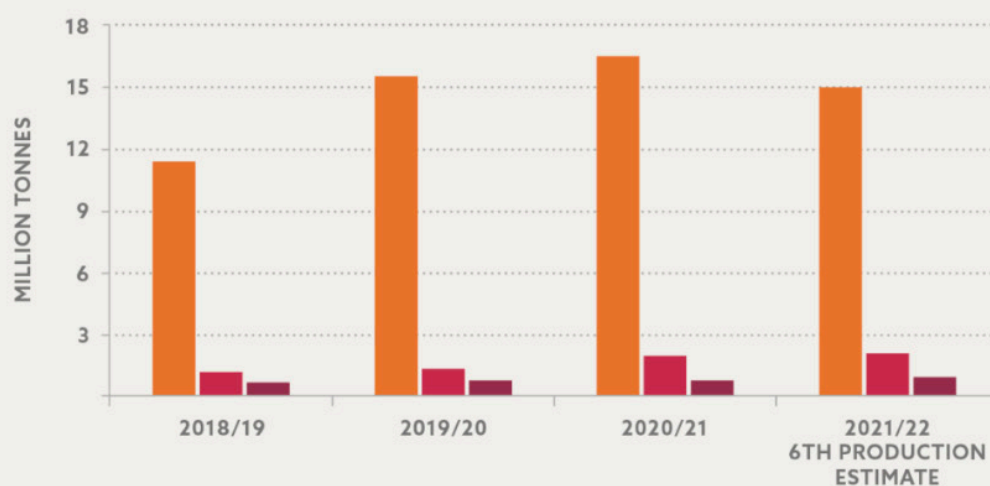
Essentially, this is down by 6% from the 2020/21 season crop but well above the 10-year average maize harvest of 12,80 million tons and annual domestic consumption of 11,80 million tons. This means South Africa remains a net exporter of maize, which we anticipate to be just over 3,0 million tons in the 2022/23 marketing season (note: this marketing year corresponds with the 2021/22 production season).

Soya

Another important and most welcome crop development was the increase in South Africa's soybean harvest for the 2021/22 season to a new highest crop of 2,2 million tons. This large soybean harvest will help reduce South Africa's reliance on soybean meal imports. In the week of 22 July 2022, about 2,09 million tons had already been delivered to commercial silos.

SOUTH AFRICA'S MAJOR SUMMER GRAIN AND OILSEEDS PRODUCTION

■ Maize ■ Soybeans ■ Sunflower Seed



Source: Crop Estimates Committee and Agbiz Research

Sunflower

Surprisingly, Sunflower seed delivered a 26% increase in production, amounting to 845 550 tons. The slow deliveries in sunflower seed regions partly explain this action. Still, the fact that the plantings started pretty late in these regions is also a factor to consider. For example, on 22 July 2022, about 792 050 tons had already been delivered to commercial silos.

Aside from these significant summer crops, the sorghum harvest is estimated at 136 200 (-3% m/m), dry beans harvest at 51 720 tons (-3% m/m) and

at 136 200 (-3% m/m), dry beans harvest at 51 720 tons (-3% m/m), and groundnuts are at 49 000 tons (-11% m/m).

In sum, these domestic production data will have minimal impact on prices. Global events mainly influence domestic grain and oilseed prices. The Russia-Ukraine war worries and concerns about 2022/23 global production following reports of heatwaves and drought in the Northern Hemisphere continue to present upside support on prices, which are ultimately reflected in the South African grains market.

Still, the fact that domestic grains and oilseeds supplies are fairly higher provides comfort regarding domestic needs and even exports to our traditional markets. Ultimately, the relatively higher grains and oilseeds prices bode well for farmers in areas that didn't experience much crop damage at the start of the season. Meanwhile, the consumers and the livestock will likely experience increased costs over the foreseeable future.

The Global Feed Situation

Since late 2019, the world has been in turmoil, facing a series of extraordinary situations impacting spheres no one could have imagined. COVID-19 has directly caused an unthinkable human catastrophe, with an estimated 600 million people globally contracting the virus, while 6.5 million deaths were reported at the time of this report.

While COVID-19 changed human lives dramatically, animal diseases dramatically affected the health of production animals and the global supply of animal protein. The most prominent animal diseases are African Swine Fever (ASF) and Highly Pathogenic Avian Influenza (HPAI), and closer to home, South Africa has been struggling to contain and manage Foot and Mouth Disease (FMD) for several years.

Thus, it is no surprise that these extraordinary situations spilt over to all aspects and segments of civilisation, disrupting everyday life as we knew it. More specifically, as feed manufacturers, the economic arena where we spend most of our time and effort was disrupted, bringing some segments to a grinding halt.

Feed and food, however, remain an essential global service to man and animal, and although being severely disrupted within the value chains and supply chains and having to make changes and having to adopt new processes and procedures for doing business in the COVID world, the international feed industry kept on supplying the world's animal protein producers with feed, with global production totalling an estimated 1,235.5 million tons in 2021 versus 1,207.9 million tons in 2020.

TOTAL FEED PRODUCTION PER REGION – 2021 (1000 TONS)

REGION	LAYER	BROILER	PORK	DAIRY	BEEF	AQUA	PETS	OTHER	TOTAL
Africa	8.3	11.7	2.5	5.6	2.5	1.5	0.5	12.2	44.2
Asia-Pacific	75.9	148.3	138.9	25.6	13.7	37.6	3.8	8.0	458.1
Europe	30.5	54.7	75.2	44.4	16.9	4.5	11.6	30.7	266.8
Latin America	23.7	65.9	35.1	21.0	13.4	5.3	7.2	7.9	178.3
North America	15.1	58.2	57.2	28.7	66.8	1.7	10.6	18.3	252.9
Middle East	4.3	8.0	0.0	6.2	1.5	0.5	0.1	4.0	24.5
Oceania	1.0	4.0	1.4	1.5	0.7	0.2	0.5	1.7	10.4
TOTAL	158.7	350.9	310.2	132.9	115.5	51.4	34.2	82.8	1,236.5
% OF TOTAL	12.8	28.4	25.1	10.8	9.3	4.2	2.8	6.7	

* Latin America includes all Central-American countries and Mexico

** North America includes USA and Canada

Source: Alltech Global Feed Survey – 2022

Production exceeded expectations in many countries, mainly due to the recovery from COVID-19 lockdowns, with China remaining the world's largest feed producer since 2020. The global pig sector rebounded from African Swine Fever (ASF) with a feed tonnage increase of more than 6%. In this recovery, China's role was evident throughout the year while replenishing their pig herds lost to ASF.

Most agricultural stakeholders continue to focus on innovation and partnerships, which have proved essential to sustaining a business over the last year. If the future of agriculture is considered, there are various reasons to remain positive and optimistic.

The agricultural and agro-processing sectors have proven their resilience and energy in the face of challenges such as COVID-19, animal diseases, disruption of value, and supply chains. The global feeds sector has also shown its ability and appetite to continue growing and modernising to remain sustainable in the "New Normal" or whatever comes our way.

The top 10 feed-producing countries have increased to an estimated 65% of the global feed market share in 2021, showing an increase of 2%. If this list is expanded to the top 20 producing nations, they produce an estimated 80% of

the global feed combined.

The global pig sector rebounded from African Swine Fever (ASF) with a feed tonnage increase of more than 6%, increasing from 286.4 million tons in 2020 to 310.2 tons in 2021. Broiler feed production also displayed a 4.9% growth from 334.6 million tons in 2020 to 350.9 tons in 2021.

AFMA'S Strategic Path Moving Forward

As reported in the previous IFIF Annual Report, AFMA has been crafting and re-shaping its Strategy since 2019, to be more outwards focused with the view – to unlock growth in the local agriculture value chain – through being more inclusive through fostering partnerships and close cooperation with fellow value chain partners.

Due to its unique positioning within these value chains and continuously shaping and building on AFMA's vision, it is truly giving full meaning to – **“The dynamic animal feed thought leader influencing food security through partnerships with all stakeholders”**.

To remain relevant in any economic sector, organisations or companies need to ensure sustainability. Therefore, long-term partnerships within the various value chains should be fostered making and keeping it a reality.

Ultimately, the overarching goal in these partnerships is to ensure that sustainable growth is unlocked for all value chain partners – “any chain is only as strong as its weakest link”, highlighting the importance that the health and resilience of all links should be nurtured and developed to their optimum, ensuring an efficient and sustainable value chain.

AFMA's new vision and mission have never been so strongly highlighted since 2020 when planning and groundwork were conducted to establish the National Framework of the Agricultural and Agricultural Processing Masterplan (AAMP). This followed an identical process because of the experience gained while shaping the SA Poultry Sector Masterplan (SAPMAP) in 2019, and even more so focused on the execution of the Mater Plans.

To strengthen AFMA's strategic efforts and have the necessary knowledge and background of the different value chain inter-linkages, AFMA commissioned a Strategic Study on the South African Feed Industry: <https://www.afma.co.za/download/the-south-african-feed-industry-a-strategic-perspective/?wpdmdl=10841> AFMA's benefit of being centrally integrated as a value chain partner to several other value chains is indicated by the illustration.

AFMA members are the largest suppliers to the SA poultry industry, supplying more than 4,5 million tons of the total 7.1 million tons produced, amounting to 63% of total AFMA feed sales. The balance of the production is beef & sheep, dairy, pork, and other species. The AFMA strategic focus will thus be on the core factors influencing the cost of raw materials and feed ingredients, which add up to 75% to 85% of the final feed cost. AFMA will remain a key partner in the grains and oilseeds value chains, exploring all possible options to increase the effectiveness and competitiveness of its members' clients.

Besides being involved in the raw material supply side, AFMA is a critical supporting industry in the SAPMAP, supporting the SA poultry industry, its largest client. From a feed perspective, the main goal is parallel to the poultry development and expansion, ensuring sufficient feed and raw materials are always available.

AFMA closely cooperates with Grain SA and other grains and oilseeds value chain partners to execute the above. Critical in this role is to ensure enough maize and soy products are available due to AFMA being the largest single group of processors of maize and soy products in SA, primarily destined for poultry.

AFMA members are processing 3.5 million tons of maize and maize products and 1.2 million tons of soy and soy products into feed, of which 25% of all maize is available for the commercial market and 70-75% of all soy available for commercial processing in SA.

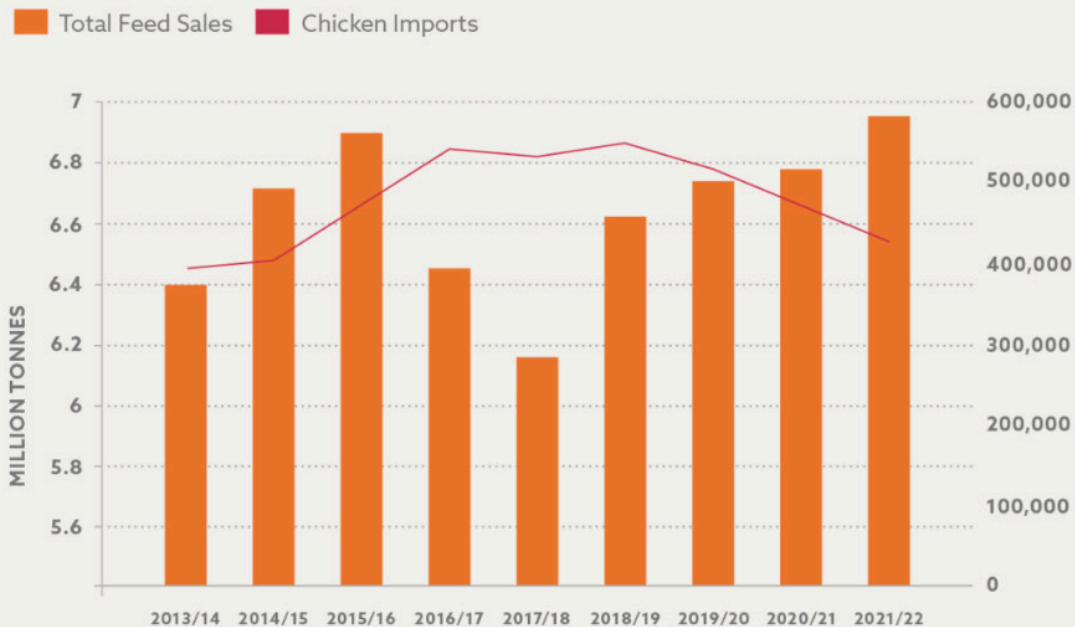
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The South African Feed Situation

During 2016/17 and 2017/18, South Africa experienced some of the worst droughts in its history, impacting all segments of agricultural value chains and influencing both the human food and animal feed sectors. The continued severe drought forces producers to significantly reduce herd sizes due to the cost of feeding animals and keeping only breeding stock to rebuild herds once the drought conditions subside. During these years, AFMA feed sales suffered a triple blow (illegally dumped chicken, severe local drought conditions, and high commodity prices), leading to the most significant annual decrease in AFMA feed sales on record, dropping by 6.2%, which continued in 2017/18, by a further 1.9%.

TOTAL FEED SALES & CHICKEN IMPORTS 2013/14 - 2021/22



Source: AFMA

Despite the extensive droughts and challenges, in 2016/17 and 2017/18, it provided insight into the high levels of illegally dumped chicken in the SA market from 2013/14. The reduction in chicken imports only started after the Poultry Industry started applying for unfair trade remedies (anti-dumping import duties). The industry was in distress, which gave way to the SA Poultry Sector Masterplan (SAPMAP).

As climatic and weather conditions improved, it gave way to more favourable commodity prices leading to the recovery of feed sales by 4.6% in 2018/19.

Due to various market influences, feed sales continued to recover consecutively, although at a slower pace and with different increments. Feed sales growth recovered by 1.2% in 2019/20, 1.0% in 2020/21 and a further 2.2%, amounting to 6 938 537 tons in 2021/22.

Despite four consecutive years of year-on-year volume growth, it is clear that AFMA feed sales do not reflect the theoretical potential which could have been achieved in a free and fair market with limited challenges. However, the feed industry's off-takers face ongoing challenges on various fronts.

TABLE 1: AFMA FEED SALES FROM 2017/18 TO 2021/22 (APR - MAR)* (TONS)

FEED TYPE	2017/18	2018/19	2019/20	2020/21	2021/22	% GROWTH
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TABLE 1: AFMA FEED SALES FROM 2017/18 TO 2021/22 (APR - MAR)* (TONS)

FEED TYPE	2017/18	2018/19	2019/20	2020/21	2021/22	% GROWTH
Dairy	950,243	956,400	967,560	948,768	916,934	-3.4
Beef & Sheep	860,052	906,485	845,843	835,604	902,108	8.0
Pigs	342,076	379,313	394,184	389,867	453,652	16.4
Layers	784,856	900,668	999,407	1,001,891	981,023	-2.1
Broilers	2,583,948	2,617,516	2,709,516	2,836,404	2,903,007	2.3
Broiler Breeders	476,924	528,181	536,709	535,531	528,289	-1.4
Horses	32,075	28,008	26,182	21,772	22,468	3.2
Dogs (D&W)	84,650	84,289	23,416	1,483	1,049	-29.3
Ostriches	14,446	10,686	14,450	13,739	9,228	-32.8
Game Feed	52,591	41,208	34,257	26,325	24,606	-6.5
Other	12,139	13,809	10,834	12,529	13,279	6.0
Aquaculture	4,730	4,847	4,048	3,387	9,279	174
CONCENTRATES						
Pigs	14,583	23,736	24,229	24,290	23,236	-4.3
Other	2,287	2,824	5,743	8,959	13,968	55.9
Beer finisher	52,215	55,331	46,759	51,109	55,379	8.4
Dairy + urea	19,841	17,350	11,438	7,599	6,860	-9.7
Dairy - urea	8,118	9,614	3,863	3,517	2,576	-26.8
Sheep	25,578	23,367	23,751	20,939	25,246	20.6
Layers	26,134	29,339	31,936	32,083	33,674	5
Broilers	2,425	2,023	2,174	4,024	2,624	-34.8
Ostriches	0	162	39	43	402	834.9
Horses	45	47	11	4	616	15300
Ruminants - other	4,362	9,444	7,472	11,996	9,034	-24.7
TOTAL	6,354,318	6,644,647	6,732,822	6,791,863	6,938,537	
% GROWTH	-1.9	4.6	1.2	1	2.2	

Source: AFMA Stats - Only AFMA Members

The poultry and livestock industries are facing one of the worst spells of a widespread conundrum of animal diseases. It is very rare that animal diseases challenge the poultry and livestock sectors at the same time. Poultry with Highly Pathogenic Avian Influenza (HPAI), Cloven hoofed animals with Foot &

Mouth Disease (FMD), and the Pork Industry with African Swine Fever (ASF).

Suppose these local animal diseases aren't enough. In that case, these industries have to deal with the combination of disjointed and disrupted global supply chains still trying to fully recover from the aftermath of the COVID-19 pandemic, which was dealt a further globally disruptive blow to which the extent isn't calculated when Russia invaded Ukraine.

This gave way to increased uncertainty in the commodity markets, which were already jittery due to the effects of global climatic and weather conditions on Northern Hemisphere countries. This increased uncertainty was directly reflected in international commodity market pricing, leading to an increase in already high prices, sometimes moving up to global record prices. Examples of this were sunflower seed, sunflower oil and wheat, due to Ukraine and Russia being two of the major international producers and exporters of these commodities.

As one of the leading, supporting industries and a value chain partner of the Poultry and Livestock Industries, AFMA's view is that growth in local feed production and sales would only be possible if the Poultry and Livestock Industries are successful in implementing the SAPMAP and AAMP, in direct partnership with Government, creating an export market for these economic sector's produce.

National Feed Sales: 2021/22

NATIONAL ANIMAL FEED PRODUCTION - 2021/2022 (TONS)

FEED TYPE	AFMA FEEDS PLUS FEEDS DERIVED FROM CONCENTRATES	NATIONAL FEED PRODUCTION**	AFMA FEED AS A % OF NATIONAL PRODUCTION
Dairy	948,387	2,600,809	36.5
Beef & Sheep	1,060,334	3,179,446	33.3
Pigs	511,742	1,086,174	47.1
Layers	1,065,207	1,305,565	81.6
Broilers	3,437,857	3,468,237	99.1
Dogs	1,049	368,287	0.3
Horses	24,521	127,310	19.3
Ostriches	10,568	88,014	12.0
Aquaculture	9,279	5,125	18.1
Other	37,885		
TOTAL	7,106,829	12,147,122	58.5

Source: Dr Erhard Briedenhann - Modelling

The above table shows AFMA's market share versus national feed sales showed some changes between species. AFMA's market share of dairy beef & sheep reduced while AFMA's national market share increased in pig, layers, and broiler feeds. It should be noted that in a case where the AFMA's sales volume exceeds the national volume, it must be regarded as feed exports to third countries.

National feed volumes for 2021/22 were calculated at 12 147 122 tons, recording a 1.6% increase in national feed sales.

For more information please visit: www.afma.co.za.

[Browse other regions](#)



United States

AFIA

Founded in 1909, the American Feed Industry Association (AFIA) is the world's largest organization devoted exclusively to representing the business, legislative and regulatory interests of the U.S. animal food industry and its suppliers. With over 650 domestic and international members, the AFIA represents more than 75% of the feed and 70% of the non-whole-grain ingredients manufactured in the United States.

2022: Year In Review

Paving the Way for New Animal Food Ingredients

In 2022, the U.S. animal food industry made great strides in resolving many regulatory bottlenecks within the U.S. Food and Drug Administration. The AFIA's advocacy efforts resulted in Congress increasing funding to the FDA to properly staff its ingredient review team, allowing the agency to hire and train 12 additional staff. These additional staff are critical to reducing the backlog of animal food ingredients waiting to be reviewed and approved at the federal level.

The industry is also seeing the tides turning on label claims for animal food ingredients. For years, the AFIA has been calling on the FDA to update its outdated 1998 Policy and Procedures Manual Guide 1240.3605, which has prevented animal food manufacturers from clearly identifying the ways their products may bring about non-nutritive benefits (e.g., reduced greenhouse gas emissions or food safety pathogens) on the labels, unless they go through the FDA Center for Veterinary Medicine's cumbersome drug approval

process. Last fall, the FDA heard overwhelming support in making this change from a range of stakeholders, including industry, the U.S. Congress and Biden administration. The FDA has informed industry that it does not believe it has the authority to regulate these products as feed ingredients without congressional approval.

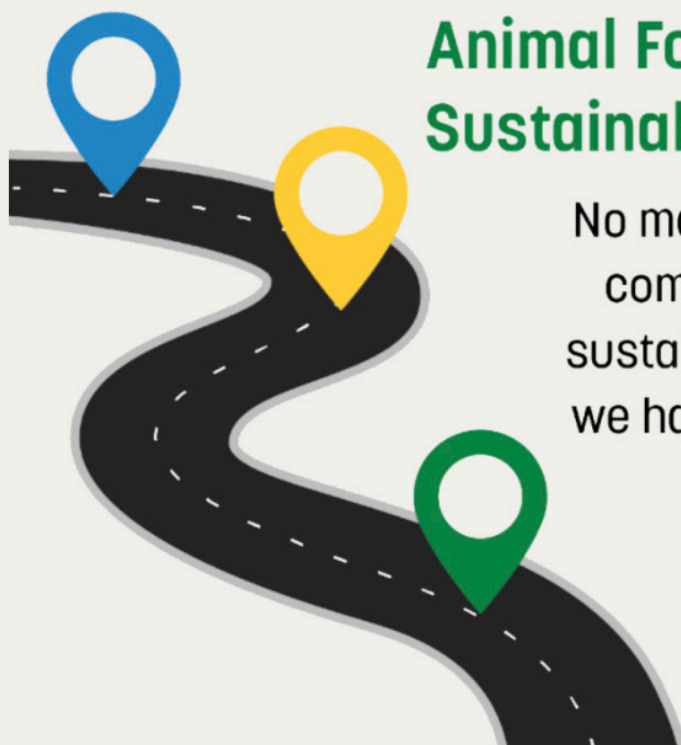
As of June 2023, there is now a bipartisan legislative solution – the Innovative Feed Enhancement and Economic Development Act – moving forward in Congress that would amend the Federal Food, Drug and Cosmetic Act to establish a new category of animal food additives that do not impact animal nutrition, but rather, act in the animal's gut to provide health benefits, reduce emissions or address human food safety concerns. The AFIA is working with champions in Congress to move this bill forward so that U.S. feed manufacturers can be on equal footing with their international counterparts, whom already have access to these novel technologies.

Developing Industry Sustainability Tools

With the Institute for Feed Education and Research (IFEEDER) and other stakeholders, the AFIA blazed new trails on sustainability over the past year, identifying barriers to industry progress and providing the groundwork for future work to support members in their sustainability journeys.

IFEEDER developed a toolkit equipping feed grain and oilseed processors, animal feed and pet food manufacturers, ingredient suppliers and equipment manufacturers with guidance and reference materials to support them in their sustainability journeys. The toolkit materials, grouped into three stages, include practical tools and resources, a scientific literature review of what the global feed industry has accomplished to date, insights into building the sustainability business case and message mapping to help communicate stories to key audiences and more. The toolkit is available free to members and for a fee to nonmembers via ifeeder.org.

and for a fee to nonmembers via ifeeder.org.



Animal Food Industry Sustainability Toolkit

No matter where your
company is at on its
sustainability journey,
we have tools for you.

Visit ifeeder.org
to learn more!



IFEEDER is now moving forward with the second phase of its project and is seeking partners to strategically implement many objectives identified in the initial work. In this second phase, IFEEDER will work with these partners to align data measurements that are important to the industry and its customers, improve efficiency and effectiveness of the use of life cycle assessments, communicate the environmental benefits of innovations supporting stakeholders and develop a 2.0 version of the toolkit with resources and value propositions clearly identified for each segment within the U.S. animal food value chain. Companies looking to join the effort can visit [IFEEDER's website](https://ifeeder.org) for more information.

Looking Ahead to 2024 & Beyond

Battling Domestic Supply Chain Challenges

The AFIA continues to work with agriculture partners to identify and address supply chain issues with the Biden administration, particularly on U.S. rails, ports and highways. Most recently, the AFIA urged the Surface Transportation

Board to continue its actions to accelerate railway safety and strengthen the functionality of rail systems overall, specifically to improve service to agricultural shippers before railroad capacity becomes an urgent, national issue. The association is also actively urging the White House to resolve ongoing labor disputes, which have nearly derailed shipping via rail and at West coast ports throughout the year. These ports are critical for protecting \$7.5 billion in exports of feed, feed ingredients and pet food that the animal food industry supplies to its international customers.

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Ensuring Trade Doors Remain Open

The AFIA also continues to implore the U.S. Trade Representatives (USTR) to negotiate new trade agreements with key trading partners, yet the Biden administration seems unwavering in its moves to negotiate unconventional "frameworks," such as the Indo-Pacific Economic Framework. As recent history has proven, a trade stoppage in one area can send ripple effects throughout the world, so the United States must diversify its ingredient sources and export markets to keep future supplies and customer base stable. The AFIA is working to bolster funding for U.S. Department of Agriculture (USDA) market development programs, which have remained stagnant for two decades despite international competitors doubling down, and putting pressure on the administration to reduce high duties on imports that keep costs artificially high for the agriculture industry as a whole.

The AFIA spearheaded a campaign to change a crucial USDA Animal and Plant Health Inspection Service (APHIS) export certificate for animal products – the Veterinary Services form 16-4. Previously, the form listed several animal diseases, including African swine fever (ASF), which the United States is free from, but should an outbreak occur, would have invalidated the export form and therefore, stopped trade of all U.S. animal-based products, even if the products were unrelated to the disease (e.g., ASF in poultry products). The updated form moved the disease statements down to the "additional declarations" section, instead of the official letterhead, although subtle, effectively allowing APHIS to make changes to the form in the event of an outbreak thus allowing non-affected products to continue to trade. Now, the association is proactively working with APHIS to go country-by-country, product-by-product to remove any diseases not relevant to those products, particularly as APHIS negotiates new health certificate agreements.

Moving Forward

Looking ahead, the AFIA continues to push back at international protectionist, non-science-based policies that limit innovation and restrict animal protein production. It is also advocating for federal programs that foster the next-generation workforce, boost the country's defenses against animal diseases and facilitate research on and development of the game-

changing solutions that will help the U.S. achieve its sustainability and food security goals.

For more information please visit: afia.org.

Browse other regions



IFIF Members

IFIF is made up of national and regional feed associations from Africa, Asia Pacific, Europe, North and South America and the Middle East, as well feed related organizations and corporate members from around the globe.

IFIF members represent over 80% of total compound animal feed production worldwide.

National and Regional Associations



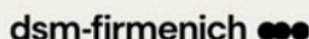
Corporate Members



Feed Related Organisations



Corporate Members



Feed Related Organisations



IFIF Leadership 2022 – 2023

Under its Articles of Association, held in Luxembourg, IFIF is managed by the Executive Director and overseen by an elected Chairman and Board of Directors drawn from the membership. Board Members serve two-year terms and are elected at the IFIF General Assembly.

IFIF Executive Committee 2022 – 2023

Ruud Tijssens

Chairman, International Feed Industry Federation, The Netherlands

Adriano Marcon

President & Group Leader, Cargill Animal Nutrition, USA

Alexandra de Athayde

Executive Director, International Feed Industry Federation, Germany

Asbjørn Børsting / Pedro Cordero (from June 2023)

President, European Feed Manufacturers' Federation, Belgium

Dr. Bruno Kaesler

Managing Director, Kaesler Nutrition GmbH & Treasurer, International Feed Industry Federation, Germany

Constance Cullman

President & CEO, American Feed Industry Association

De Wet Boshoff (until January 2023)

Executive Director, Animal Feed Manufacturers Association, South Africa

[Roberto Betancourt](#)

Board Member, Brazilian Feed Industry Association, Brazil

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[Zongli Wang](#)

Secretary General, China Feed Industry Association, China

IFIF Board Members 2022 – 2023

[Ruud Tijssens](#)

Chairman, International Feed Industry Federation, The Netherlands

[Adriano Marcon](#)

President & Group Leader, Cargill Animal Nutrition, USA

[Alexandra de Athayde](#)

Executive Director, International Feed Industry Federation, Germany

[Asbjørn Børsting / Pedro Cordero \(from June 2023\)](#)

President, European Feed Manufacturers' Federation, Belgium

[Dr. Bruno Kaesler](#)

Managing Director, Kaesler Nutrition GmbH, Germany

[Dr. Colm Moran](#)

Director European Regulatory Affairs, Alltech, France

[Constance Cullman](#)

President & CEO, American Feed Industry Association (AFIA)

[Daniela Calleri](#)

VP Business Management Animal Nutrition, BASF SE, Germany

[David Bray](#)

President, Stock Feed Manufacturers' Council of Australia, Australia

[Dr. David Nickell](#)

Vice President Sustainability and Business Solutions, dsm-firmenich, Switzerland

[De Wet Boshoff \(until January 2023\)](#)

Executive Director, Animal Feed Manufactures Association, South Africa

[Frédérique Clusel](#)

Managing Director, Phileo Lesaffre Animal Care, France

Dr. Frank Chmitelin

Executive Vice President Strategy, Sustainability and Safety, Adisseo, France



Jesse J. Sevcik

Senior Director Global Government Affairs, Elanco Animal Health, USA

Joerg Seifert

Secretary General, EU Association of Specialty Feed Ingredients and their Mixtures, Belgium

Melissa Dumont

Executive Director, Animal Nutrition Association of Canada, Canada

Dr. Michael Binder / Andrea Simon (from July 2023)

Vice President Sustainability Development, Evonik Industries AG, Germany

Nicolas Martin

Sustainability and Public Affairs Director, METEX NØØVISTAGO, France

Dr. Reinder Sijtsma

Government Relations & Regulatory Affairs Director, Nutreco & Treasurer, International Feed Industry Federation, Netherlands

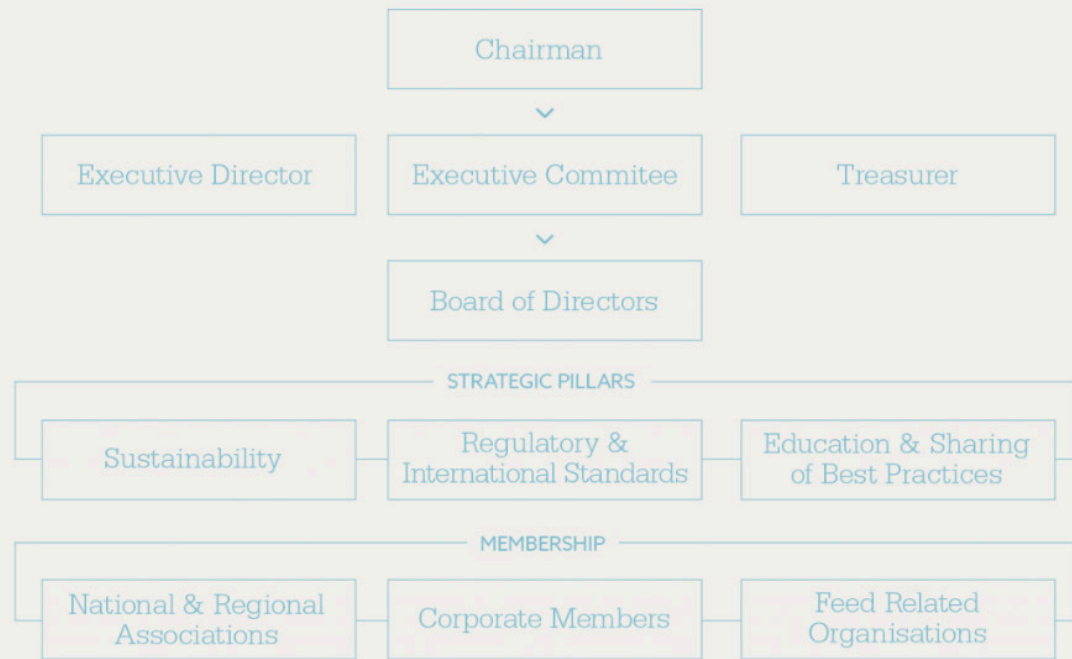
Roberto Betancourt

Board Member, Brazilian Feed Industry Association, Brazil

Zongli Wang

Secretary General, China Feed Industry Association, China

IFIF Structure



IFIF is registered as a non-profit organization in Luxembourg and was founded on December 1, 1987.

Expert Committees 2022 – 2023

Experts from member companies and national associations participate in IFIF's expert and technical committees. These consider key industry issues and help develop global feed and food industry standards.

IFIF Regulatory Committee

Members 2022 – 2023

Chair: Leah Wilkinson, Vice President, Public Policy and Education, AFIA

- Alexandra de Athayde, Executive Director, IFIF
- Alessandra Tossoli, Global Regulatory Affairs / Animal Nutrition – LATAM, IFF
- Alicia Juárez Pallarés, Consortia and Regulatory Manager, FEFANA
- Allen Bridges, Government Affairs, Elanco
- Ana Paula Henrique, Regulatory Director, AB Vista
- Andressa Caliman, Head of Regulatory Affairs (hN&B), IFF
- Annie Bailey, Senior Regulatory Affairs Specialist, Chr. Hansen A/S
- Ariovaldo Zani, CEO, Sindirações
- Arnaud Bouxin, Director Feed Safety and Regulatory Affairs, FEFAC
- Bente Tvede Lund, Regulatory Affairs Manager, Novozymes A/S
- Bernadette Okeke, Global Director and Senior Adviser Regulatory Affairs and Compliance, Lallemand
- Bruno Caputi, Regulatory / Quality Coordinator, Sindirações

- Caroline Bertein, Regulatory Affairs, Phileo
- Caroline Carvalho, Regulatory, Chr. Hansen
- Chandrika Venkatesh, Executive Director, CLFMA of India
- Colm Moran, Director European Regulatory Affairs, Alltech
- Duncan Rowland, Executive Director, SFMCA / FIAAA
- Eliane Dannenhauer, Regulatory Affairs Supervisor, Impextraco
- Eric Auclair, Head of Regulatory Affairs and Downstream Development, Phileo
- Erika Sene, Regulatory Affairs, Biorigin
- Gerald Schultheis, Head of Quality and Regulatory Affairs, dsm-firmenich
- Giacomo Sisinni, FAMi-QS
- Hans van Dam Government Relations Manager, Nutreco#
- Jesse Sevcik, Sr. Director Global Government Affairs, Elanco
- Jillian Nash, Regulatory Manager, Feed Division, Alltech
- Joerg Seifert, Secretary General, FEFANA
- Juliana Hardt, Regulatory Affair Manager, Biorigin
- Karine Tanan, Principal Scientist, Scientific and Regulatory Affairs EMEA, Cargill
- Laure Clasadonte, Analytics & Operations Lead, QM & Regulatory Affairs Manager, Herbonis
- Leah Wilkinson, Vice President, Public Policy and Education , AFIA
- Liesl Breytenbach, Executive Director, AFMA
- Liliana Quillama, Project coordinator, GMP+ International
- Mallory Gaines, Manager Market Access and Trade Policy, AFIA
- Marie-Julie Hannoun, Regulatory Affairs Director, METEX NØØVISTAGO
- Melissa Dumont, Executive Director, ANAC
- Monica Fanti, Global Regulatory Affairs Manager, Alltech
- Norma Cavazos-Guzman, Manager of Regulatory Affairs, Phibro Animal Health Corporation
- Padmakumar Pillai, Scientific and Regulatory Affairs, Cargill
- Peyman Zolfagharian, Secretary-General, Iran Feed Industry Association
- Reinder Sijtsma, Director Government Relations & Regulatory Affairs, Nutreco
- Ruifeng Xu, International Division, CFIA

- Ruth Hayler, Director Regulatory Affairs & Quality Compliance, BASF SE
- Sabine Van Cauwenberghe, Regulatory Affairs Manager, dsm-firmenich
- Sarah Hopkins, Government Affairs Manager, ANAC
- Sébastien Oguey, Regulatory Affairs & Quality Manager, ADM
- Séverine Deschandelliers, Head of Global Regulatory Affairs, Adisseo
- Simone Marques Alessandri, Technical Consultant, Feedlatina
- Sophie von Alvensleben, Regulatory Project Manager Bio Amino Acids, Evonik Operations GmbH
- Troy Wilkins, Regulatory Affairs Specialist, BASF

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IFIF Sustainability Committee

Members 2022 – 2023

Chair: David Bray, President, Stock Feed Manufacturers' Council of Australia (SFMCA)

- Alexandra de Athayde, Executive Director, IFIF
- Anna Wessels, Scientific Affairs Manager, Kaesler Nutrition
- Anne Gaasbeek, Corporate Sustainability manager, Nutreco
- Anton van den Brink, Deputy Secretary General, FEFAC
- Bruno Caputi, Regulatory Affairs, SINDIRAÇÕES
- Bruno Kaesler, Managing Director, Kaesler Nutrition
- Constance Cullman, President & CEO AFIA
- Duncan Rowland, Executive Officer, SFMCA/FIAAA
- Lara Moody, Executive Director, Institute for Feed Education & Research
- Luca Capodiecì, Technical and Regulatory Manager, FEFANA
- Frank Chmitelin, Executive Vice President Strategy, Sustainability and Safety, Adisseo
- Hans van Dam, Government Relations Manager, Nutreco
- Jen Butcher, Head of Commercial Responsibility, AB Agr
- Joerg Seifert, Secretary General, FEFANA
- John Stewart, Advisor Government Affairs, Elanco Animal Health
- Karine Tanan, IFIF Nutritional Innovation Chair, IFIF
- Laura Pasculli, Executive Director, Chamber of Feed Industry, ANDI

- Linda Midgley, Enterprise Sustainability Lead – Animal Nutrition and Health, Cargill
- Lucas Cypriano, President, WRO
- Mallory Gaines, Director of Market Access & Multilateral Affairs, AFIA (Observer)
- Melissa Dumont, Executive Director, Animal Nutrition Association of Canada
- Michael Binder, Director Sustainability Development, Evonik
- Nicolas Martin, Sustainability Director, METEX NØØVISTAGO
- Philippe Becquet, Technical Advisor, IFIF
- Remco Veelenturf, Manager Scheme & Customer Service, GMP+ International
- Roberto Betancourt, Counselor, Sindirações
- Ruud Tijssens, Chairman, IFIF
- Sabine Van Cauwenberghe, Regulatory Affairs Manager, dsm-firmenich
- Sebastian Csaki, Senior Advisor, IFIF
- Sebastian Form, Director Applied Sustainability Nutrition & Health, BASF
- Tomas Belloso, Vice President Regulatory Affairs, Bond Pet Foods

IFIF Working Group on Nutritional Innovation to Promote Animal Health

Members 2022 – 2023

Chair: Dr. Karine Tanan, Principal Scientist, Scientific and Regulatory Affairs EMEA, Cargill

- Alexandra de Athayde, Executive Director, IFIF
- Philippe Becquet, Technical Advisor, IFIF
- Aaron Cowieson, Corporate Science Fellow, dsm-firmenich
- Alicia Juárez Pallarés, Product Authorisation and Regulatory Manager, FEFANA
- Arnaud Bouxin, Director for Feed Safety and Regulatory Affairs, FEFAC
- Aurelie Preynat, Scientific & Regulatory Affairs Manager, Adisseo
- Bernadette Okeke, Global Director Government and Trade Affairs and Senior Adviser, Regulatory Affairs and Compliance, Lallemand Animal Nutrition
- Bruno Caputi, Regulatory & Quality Affairs Manager, Sindirações
- Chandrika Venkatesh, Executive Director, CLFMA of India

- Arnaud Bouxin , Director for Feed Safety and Regulatory Affairs, FEFAC
- Aurelie Preynat, Scientific & Regulatory Affairs Manager, Adisseo
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- Bruno Caputi, Regulatory & Quality Affairs Manager, Sindirações
- Chandrika Venkatesh, Executive Director, CLFMA of India
- Eric Auclair, Regulatory Affairs and Downstream Development Director, Phileo
- Franz Waxenecker, Development and Innovation Director, dsm-firmenich
- Gerald Schultheis, Director Global Regulatory Affairs, dsm-firmenich
- Hans Van Dam, Government Relations Manager, Nutreco
- Henk Enting, Global Poultry Technical Director, Cargill
- Joerg Seifert, Secretary General, FEFANA
- Johanne Tournie, Global Registration Coordinator, Cargill
- Laura Clasadonte, Analytics & Operations Lead, QM & Regulatory Affairs Manager, Herbonis
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- Mads Mourier, Senior Department Manager, Novozymes
- Maiara de Moura Suardi, Regulatory Affairs Specialist, BASF
- Padmakumar Pillai, Senior Advisor R&D Scientific and Regulatory Affairs, Cargill
- Paul Davis, Director of Quality Animal Food Safety and Education, AFIA
- Predrag Persak, Chairman of the Animal Nutrition Committee, FEFAC
- Reinder Sijtsma, Regulatory Affairs Director, Nutreco
- Richard Murphy, Research Director, Alltech
- Sabine Van Cauwenberghe, Senior Global Regulatory Affairs Manager, Sustainability, dsm-firmenich
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- Séverine Deschandelliers, Head of Global Regulatory Affairs, Adisseo

Definitions and Terms

The page below breaks down some common terms and definitions used throughout this online report.

Definitions

Feed (Feeding Stuff)

Any single or multiple materials, whether processed, semi- processed or raw, which is intended to be fed directly to food-producing animals.

Feed Ingredient

A component part or constituent of any combination or mixture making up a feed, whether or not it has a nutritional value in the animal's diet, including feed additives. Ingredients are of plant, animal or aquatic origin, or other organic or inorganic substances.

Feed Additive

Any intentionally added ingredient not normally consumed as feed by itself, whether or not it has nutritional value, which affects the characteristics of feed or animal products. Micro-organisms, enzymes, acidity regulators, trace elements, vitamins and other products fall within the scope of this definition depending on the purpose of use and method of administration.

Medicated Feed

Any feed which contains veterinary drugs as defined in the Codex Alimentarius Commission Procedural Manual.

Terms

Complete Feed

A nutritionally adequate feed compounded by a specific formula to be fed as the sole ration and capable of maintaining life and/or promoting production without any additional substance except water.

Concentrate

A feed used with another to improve the nutritive balance of the total and intended to be diluted or mixed to produce a supplement or a complete feed; may be unsafe if fed free choice or alone as a supplement.

Micro-ingredients

Vitamins, minerals, antibiotics, drugs/medicines, and other materials usually required in feeds in small amounts as feed additives.

Premix

A uniform mixture of one or more microingredients/ additives with a diluent and/ or carrier to facilitate their even distribution in a larger mix.

Primary feed

A feed formulated from single ingredients, sometimes containing a premix (less than less than 45.5 kg per tonne or 100 pounds per tonne).

Trace Minerals

Mineral nutrients required by animals in micro amounts (measured in units of grams per kg or smaller).

IFIF Contact

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