



# Rendering Circles

A Quarterly newsletter produced by the Australian Renderers' Association  
for customers and members

No. 12 – October, 2001

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## New Committee of ARA

Paul Stenzel was elected as President of the ARA at the July Annual General Meeting. Paul is well known in his role as commodities trader with Gardner Smith but also has extensive experience of the production side of the rendering industry. He has managed rendering plants at AMH, Dinmore and South Burnett Meatworks at Murgon.

Paul could have carved out a career in the mainstream of the meat industry. He started out as a labourer at AMH and went through the AMH management training program progressing through quality assurance and production supervision to project management. As project manager he commissioned extensions to the rendering facilities at Dinmore. Paul was supervisor of the rendering department when he left AMH to join South Burnett Meat Company as the rendering manager. Paul became works manager at South Burnett before he joined Australian Food Corporation at Coominya as abattoir manager. From AFC Paul returned to the rendering industry with Gardner Smith.

Paul completed the Diploma of Meat Technology at Massey University when he was with AMH. He graduated with honours

from Massey and was Dux of the final year. Paul lives in Ipswich with his wife Lee and their two children.

Paul told Rendering Circles that while there was a surge in tallow and meat meal prices during his first few weeks as ARA President, the rendering industry could be in for a difficult time. As President of the ARA he sees an important part of his role is to maintain and further develop relationships with regulators. He said that the industry would come under closer scrutiny from regulators, particularly with the introduction of the Australian Standard for Rendering. While regulators are keeping a closer watch on the rendering industry, they have also done excellent work to help protect the image of Australian rendered products in overseas markets and to maintain market access where possible. Paul also aims to make the ARA meetings and other decision making processes relevant to all members so that the ARA can continue to deliver benefits to all sectors of the industry. He hopes to encourage participation in the ARA's deliberations by as many people as possible. His third priority is to forge links with other industry bodies such as MLA and AMPC.



*Outgoing President congratulates Paul Stenzel on his election as President of the ARA.*

When Paul accepted the Presidency of the ARA he paid tribute to outgoing President Andy Bennett. He said that there had been sustained growth in the membership of the ARA during Andy's Presidency and that the number of members is now over 100. Paul acknowledged that his plans to build relationships with regulators and other industry bodies is a continuation of Andy's success in working co-operatively with AQIS and MLA. Paul highlighted Andy's role in



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the formation of the World Renderers Association and his election to the position of vice-president of the WRO. Paul told Rendering Circles that Andy had been a great ambassador for the Australian rendering industry at the WRO forums. Andy's other achievements were in taking the leading role in the organisation of three very successful symposia and support of the development and training of young people in the rendering industry through the ARA's accreditation workshop at the University of Western Sydney. On the down side Andy's Presidency saw record low prices for both tallow and meat meal but Paul does not take

all the credit for the August/September improvement in prices and admits the prices were improving before the end of Andy's term of office.

Andy was elected as Vice-President at the AGM. Other members elected as Directors of the ARA are David Satchell, who will look after Marketing and P.R., Tim Juzefowicz, who is responsible for technical and environmental issues, Stephen Cooke, who is responsible for membership and finance, and Bob Hathaway, who will take on special projects. Contact details for the executive of the ARA are listed in Rendering Circles. 

## Restrictions on Exports

Members will be aware that both Japan and the Philippines have placed bans on the import of meat meal and other animal protein meals. The Japanese ban follows confirmation of a single case of BSE in a dairy cow. The ban is described as temporary. The ban covers the import of all animal protein meals from all countries with the exception of certified fishmeal. It appeared that the bans were confined to imported product but in fact the use of protein meals in feed for all farm animals is banned and there will be no sales of domestic meat meal for use in feed or fertilizer.

The Ministry of Agriculture Forestry and Fisheries will convene a special committee to consider the use of meat and bone meal. The committee will include BSE and health experts and consumer representatives. One of the options that could be considered by the Japanese authorities is restricting the use of meat and bone meal to product sourced from countries that are free from BSE such as Australia.

In a press release, the Japanese MAFF explained that the use of meat and bone meal in ruminant rations has been banned but there is a risk that farmers could use meat and bone meal inappropriately. The MAFF statement went on to say 'in order to prevent misuse and commingling of meat meal in cattle feed, as well as to ensure the smooth distribution and consumption of meat including poultry and pork, we are suspending temporarily imports of MBM products from all countries as an emergency measure, and requiring the temporary suspension of the production and

sale of MBM and related products for feed and fertilizers, and the production and sale of feed and fertilizers containing MBM and related products.'

The MAFF also stated that it recognised that feeding of meat and bone meal, and related materials to livestock animals other than ruminants (poultry, swine, etc.) is scientifically sound and is a reasonable method of efficiently utilizing MBM resources.

The Australian Embassy, Tokyo and AFFA continue to closely monitor the situation in Japan and have agreed to keep the ARA informed of developments.

The Philippines has also confirmed a ban on the import of meat meal. San Ng of AQIS' Market Maintenance Group recently led a mission to the Philippines to discuss market access issues. San had the opportunity to discuss access for meat and bone meal with the responsible government under-secretary. San told Rendering Circles that the Philippines authorities agree that Australia is BSE free and that there is no issue with the biosecurity of Australian rendered product. The problem is that the Philippine government does not have the infrastructure to either monitor or control the possible leakage of meat and bone meal to ruminant feeds. For example, floor sweepings from piggeries could be taken home by workers to feed to house cows. The Philippine authorities found the only way to comply with OIE and WHO guidelines not to feed ruminant material to ruminants is to ban the import of meat and bone meal.

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The Philippine authorities gave no commitments to the Australian mission but agreed to look at ways to allow the safe import of meat meal. For example they could allow use of meat meal by major feed producers who can be controlled and checked. They realise that meat meal is an important source of protein for pigs and poultry and continued bans on imports could lead to smuggling.

A long-term loss of the Japanese market for meat meal would be a serious blow to the Australian rendering industry. In 2000/2001 Australia exported about 30,000 tonnes of meat meal worth about \$13 million to Japan according to ABS figures. This is about 6% of total Australian production of meat meal. Exports to the Philippines were about 15,000 tonnes worth almost \$5 million. 

## Australian Standard for Rendering

After a long gestation period and difficult birth the Australian Standard for Hygienic Production of Rendered Animal Products has been published. The Standard is available from CSIRO Publishing at PO Box 1139, Collingwood VIC 3056, telephone 03 9662 7666. The Standard can be ordered from CSIRO Publishing web site at <www.publish.csiro.au>. The Standards costs \$20.

The ARA is still not clear about how the Standard will be implemented. State authorities are responsible for implementing the Standard. Victorian and NSW meat authorities have told the ARA that they will be implementing and auditing against the Standard at independently licensed rendering plants and at plants on-site at domestic abattoirs over the next 12 months. It is not known if State authorities or AQIS will implement the Standard at rendering plants on-site at export registered abattoirs. If AQIS take responsibility for the Standard at export abattoirs it is likely that the ARA could do the auditing in the same way that the ARA audits EU-listed rendering plants on behalf of AQIS. Some States may accept ARA accreditation as verification that the Standard is complied with. 



## Symposium Highlights

The sixth ARA symposium held at the Gold Coast in July was the biggest symposium to date. There were 232 people at the symposium and 67 were from overseas. In addition 48 partners attended bring the total registrations to 280. The attendance was more than double the number at the first symposium in 1991. The growth in importance of the symposium is due to the work of the members and all the Presidents of the ARA. In particular Brian Bartlett has made a major contribution to the symposium series by initiating the first symposium in 1991. Fittingly Brian was honoured at the symposium dinner for his contribution to the ARA.

The success of the symposium series is also due to generous sponsorship. There were 25 sponsors of the 2001 Symposium and they

are all gratefully acknowledged by the ARA.

Mike Langenhorst of Anamax and the WRO and Doug Ward of the Argent Group and WRO gave keynote addresses. Mike gave examples of the frustrations faced by the rendering industry in the current climate. He explained how a conference call had been infiltrated resulting in an incorrect report in the New York Times that 16% of renderers did not comply with feed ban legislation. He also pointed to the negative publicity that occurred when there was a small accidental contamination of feed in a Texas feedlot. In this case the mistake was identified, reported, stock were isolated and corrective taken. The incident was an example of how public safety is protected by the industry but was presented in a negative context.

Mike said that these events have highlighted that renderers must market their industry at a political level. In the US, 30 renderers met with 130 Senators to explain the rendering industry. The renderers were able to discuss BSE, alternative fuel use and biodiesel with the Senators. As a result of communications with politicians, the National Renderers Association has been able to ensure that animal fats are included in the USDA's \$300 million bioenergy program that includes support for biodiesel production.

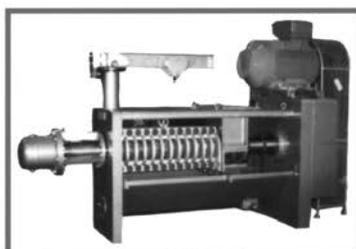
Mike also explained how the National Renderers Association has taken the initiative to demonstrate the effectiveness of the USDA ruminant feed bans. The NRA has introduced a third party certificate of compliance. In this scheme, independent auditors check for



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**Oakey Abattoir Pty Ltd - QLD**  
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Blood, Gelbone Separation

**Monbeef Pty Ltd - NSW**  
1997 - Meat & Bone LTR Rendering

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compliance with feed ban legislation at rendering and feed blending plants and provide certificates of compliance to establishments that are in full compliance with regulations.

Doug Ward gave a comprehensive picture of what is happening in the rendering industry in Europe. He said that the EU countries render 16 million tonnes of raw material. Most of this material (14.5 million tonnes) is fit for human consumption and the rendered products have a potential return. The remainder of the material (1.5 million tonnes) is dead stock and specified risk material and has no value as rendered product. Production of meat and bone meal is about 2.5 million tonnes per year and production of rendered animal fats is about the same. The meat meal made from dead stock and SRM must be incinerated and Doug explained the extreme arrangements that have to be in place to incinerate this material. He gave the example of the Irish rendering plant that sends rendered material to Germany for incineration.

Doug explained new regulations that are due to be introduced in the EU in the near future. According to these regulations animal by products will fall into one of three categories. The permitted uses of product made from the by-products will depend on the category of raw material. For example, SRM, material from TSE suspect animals and animals slaughtered in TSE eradication programs are category 1 material and must be incinerated. Manure, digestive tract and dead stock with SRM removed are category 2 material and products can be used as fertiliser, technical tallow or are incinerated. Parts of animals slaughtered for human consumption are category 3 material and can be processed to make animal food, petfood or biogas.

The new regulations also ban the practice of feeding animals with protein derived from the bodies of animals of the same species.

Despite the proposed regulations, there is still a total ban on the use of meat meal in animal feeds in the EU. With this in mind, Doug discussed the possible markets for meat meal and tallow. The UK produces 1.1 million tonnes of rendered products per year. A small amount is used in petfood. Some poultry meal is exported and there is some technical use of fats. The remaining product is disposed of in landfill and tallow is used to fire boilers. Doug said that it would be some years before traditional markets for rendered products are available and in the meantime, the best options are to use rendered product as fertiliser or for energy recovery including biodiesel.

Doug concluded that the important points for the EU rendering industry are to concentrate on producing safe, traceable product; maintain as much traditional markets as possible; develop new processes such as the ADT chemical rendering process, ensure legislation is properly implemented to minimise the risk of a rogue operator; work with customers and work with authorities to get realistic legislation.

Don Franco of the NRA gave a talk on the challenges for the future of rendered products. Don listed the challenges as BSE, handling SRM, genetically modified organisms, DAF sludge, Dioxins, antibiotic resistance and microbiological agents.

Don said that BSE is a typical example of an unforeseen and unanticipated disease. He said that BSE should not be seen as someone else's problem; it is a global problem and should be dealt with through a global approach to regulations. This approach should include input from renderers. The issue now is not BSE but the risk of variant CJD in the human population. Don explained that in the US, regulations

have been precipitated by health authorities in response to the reported link between variant CJD and BSE and not in response to BSE alone. He said that BSE is the first example of rules being made to counter a disease when the cause of the disease is not known.

EU regulations have put pressure on renderers to remove specified risk materials and dead stock from raw materials. Don pointed out that those countries that are free from BSE have been rendering and feeding animal protein to livestock safely for over 100 years. Why should they change these practices now?

GMOs, dioxin and antibiotic resistance are all developing issues that affect the rendering industry. However, Don said the possible antibiotic resistance due to sub-therapeutic use of antibiotics has been recognised for many years. A ban on this practice was recommended in 1959. Although sub-therapeutic use of antibiotics has been practiced for over thirty years, there is no clear evidence that it has contributed to antibiotic resistance of organisms of public health significance to humans. While antibiotic resistance has become an increasing problem in hospitals, it is thought to be more closely related to antibiotic use in humans rather than in animals.

Microbial agents in raw material remain an issue for the rendering industry. Don said that standard rendering practices can take care of most microbiological agents with the exception of prions and

rendering can be relied on to at least reduce prion infectivity. Don still advocates global discussions about what rendering conditions are really needed to provide safe product and what marker organisms should be used to verify safe rendering practices.

The issue of microbial agents was best summed up by Gary Pearl in his talk on the market implications of contamination risks. Gary said that rendering is the best biosecurity measure for dealing with bacteria in raw material and sure beats burying or composting.

The papers presented at the Symposium have been compiled into a set of proceedings and all registered delegates at the Symposium will receive a copy of the proceedings. In addition to the technical program, there was a lively social program. The main social event was the Symposium dinner. Ed Psaltis gave a dramatic description of experiences during the 1998 Sydney to Hobart race. Ed's team won the event after the most harrowing trip down the NSW coast and across Bass Strait. His after-dinner speech was an inspirational account of his view of the fatal race.

The other major event of the Symposium dinner was the auctioning of the cricket bat. ARA auctioneer Barry Forby did a splendid job of raising \$10,000 for Reg Evans' old cricket bat. Once again Reg stole the show by buying back his bat and at the same time making an extremely generous donation to the ARA. 🏏



*Neville and Penny Chandler with David Satchell*



*Hamish Robertson, Denis King, Stephen Cooke and Brad Christiansen enjoy hospitality courtesy of Australian Tallow Producers*

## Symposium Sponsors

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## A.J. Bush

On 16 June the A.J. Bush rendering plant at Beaudesert suffered a devastating fire. The fire took hold in the insulated panel used to clad the building and spread rapidly. Although it was a large and fast moving fire nobody was injured thanks to the safety policies in operation at A.J. Bush.

David Kassulke of A.J. Bush told Rendering Circles that the plant is well on the way to being back into full production. At the moment four out of six production lines are operating and production is about 60% of what it was before the fire. The reduced production is due to reduced kills in Queensland as much as the reduced capacity of the plant. David said that building work is progressing well and re-establishment of the building should be complete by Christmas. Some replacement of processing equipment will be required. David said that the fire has provided the opportunity to assess rendering equipment and look at improving their processes. They have designed new processes with a focus on enhanced energy and environmental performance. David and his staff have put in a lot of effort into the design of new processes and expect A. J. Bush to be bigger and better when all rebuilding is complete.

David has learned some valuable lesson from the fire. He recommends that all renderers should have contingency plans to allow for serious breakdowns and other disasters. He has also gone cold on the use of insulated panel as a building material. He said that despite the use of fire retardant in the panels he has decided to replace the burned panels with concrete panels.

On the day of the fire, David was asked about the extent of the damage. He estimated that the damage bill would be about \$25 million and it would take about 10 months to get the plant up and running to full capacity. So far these estimates are proving to be accurate.

As far as the cause of the fire is concerned, David said that there has been no clear cause identified. The police arson squad was on the scene soon after the event but their report indicates that the cause of the fire was undetermined. The police made it clear that there were no suspicious circumstances. 

## Market outlook

Tallow prices improved from less than \$400 per tonne for 1% FFA tallow in June to about \$600 per tonne in September. There was good demand for all fats and oils including palm oil and no exportable surplus in the USA. In August the US price of tallow was down slightly but Australian prices continued to improve. There was good demand on the domestic market and slaughter numbers and consequently tallow availability was restricted. This pushed up Australian prices although US prices had started to fall.

The situation has now changed dramatically. The US price has fallen about 30% since the terrorist attacks on 11 September. The US now has an exportable surplus but export markets have become difficult to find. There are reports that ships are not sailing to Pakistan from the US. However Australian exporters have not confirmed these reports. Shipping companies are applying heavy war premiums to insurance cover and this is eroding tallow prices. Apart from shipping difficulties, there is general uncertainty in all tallow markets and tallow prices are not expected to improve for some time.

There is still good domestic demand for tallow in southern states and this is helping to support lower grades of tallow. If production of tallow in southern states increases, or domestic demand falls, it is expected that the price for lower grades will fall to very low levels.

Meat meal prices fell slightly in September following improvements in July and August. The price increases in July and August were due to shortage of product and strong domestic demand. This situation has corrected and with soy prices stable the meat meal price came off slightly.

Meat meal prices are now falling sharply due to temporary import bans announced in Japan following the case of BSE. This has resulted in greater volumes of meat meal being channeled into the domestic market for October deliveries as well as creating a weaker export market. If meat meal cannot be exported to Japan there will be an extra 30,000 tonnes on the domestic market. The price of meat meal has already fallen below \$400 per tonne and traders are expecting it to go to about \$350 delivered. Losing the second largest export market is a blow and Indonesia, the major export market, will play a waiting game in respect of increased imports knowing that the market has further to fall.

The slow down in livestock kills helps to support the price of meat meal but will not overcome the main problem of a shortage of markets. If there is good rain in Queensland there will be further shortages of cattle for slaughter and the meat meal price may remain above \$400. In addition, it looks like the US beef quota could run out. This could further reduce cattle kills and help support the meat meal price.

In the US the soy crop is close to harvest and the soy market is starting to soften. This could push down meat

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meal prices. Poultry meal and feather meal have also slipped back due to lower prices for soy protein. If soy prices fall further, meat meal could be pushed down to \$350 per tonne.

Blood meal remains firm although the prices of synthetic lysine and methionine have fallen slightly. The price of blood meal remains high while fishmeal prices are firm and cattle slaughtering remains at reduced levels.

Exports of meat meal, blood meal and tallow by destination are shown in Figures 1 and 2 for 2000/2001 according to ABS figures. Pakistan is the second largest market for Australian tallow and any disruption to this market will have a major effect on tallow prices. Similarly, Japan is the second largest export market for meat meal. While this market is closed there is an extra 30,000 tonnes of meat meal to be directed to other markets. Total exports of tallow in 2000/2001 were 390,000 tonnes according to ABS figures. Total meat meal exports (excluding poultry and feather meal) were 213,000 tonnes.

## In Short

### Rendering Workshops

- Ninety-nine people attended the four workshops on specification of rendered products in June. The workshops were held in Brisbane, Melbourne, Wagga Wagga and Perth. The people at the workshop came from 52 different rendering plants, which is almost half the rendering plants in Australia.

The workshops were sponsored by Meat and Livestock Australia, Australian Meat Processor Corporation and the ARA and were organised by Bill Spooner of Food Science Australia.



Andy Fox and Brendon Pile of G&K O'Connor and Doug Gordon and Nathan O'Connor of Warrnambool Stockfeeds at the Melbourne workshop.

Figure 1: Export of meat meal to major destinations 2000/2001

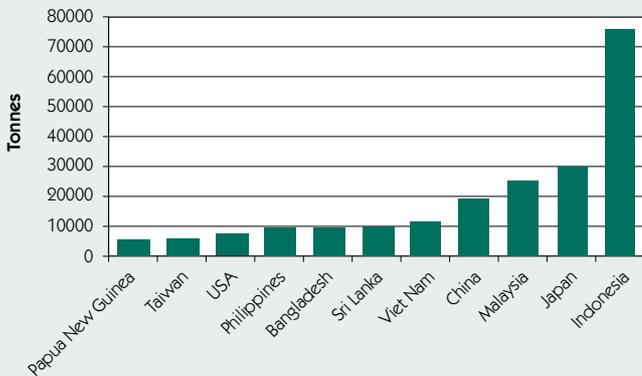
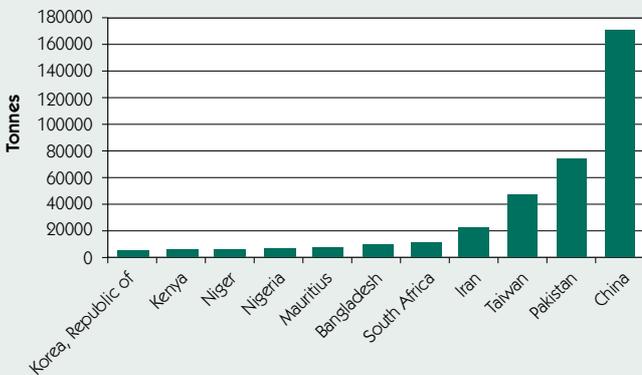


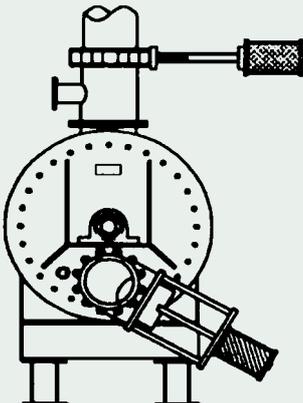
Figure 2: Export of tallow to major destinations 2000/2001



Source: Australian Bureau of Statistics

### Jacobsen Report

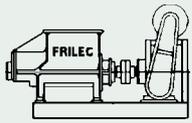
- The well known Jacobsen reports on commodity markets (including tallow and meat meal) is now available on the Internet. Jacobsen publications can be downloaded from By-products.com at the web site <[www.by-products.com](http://www.by-products.com)>. Apart from the Jacobsen reports, the By-products.com web site also provides historical data on prices.



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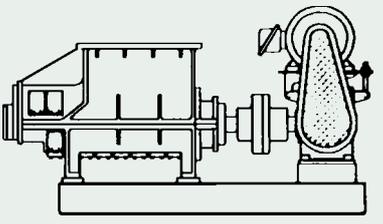


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## Symex Holdings

- Symex, the only producer of tallow derivatives in Australia, has been certified as complying with EU requirements to produce BSE-free product. Symex was audited by JAZ-ANZ accredited auditing company Quality Assurance Services (QAS) in conjunction with specialist rendering auditor Bill Spooncer. Auditor Bill Spooncer said that although the risk of BSE in Australian tallow is virtually non-existent, Symex still complied with all EU requirements to produce BSE-free oleo-chemicals.



*Auditors Bill Spooncer (left) and Duncan Mckellar (right) with Symex staff Adrian Murison, Mary Kanellos and Christine Wainright.*

## Ruminant feed bans

- States and territories are gearing up to put into practice the new ruminant feed bans approved by ARMCANZ. There will be bans on feeding all animal material except milk and dairy products and tallow to ruminants. NSW and Queensland have announced new labelling requirements to go with the bans. Animal protein meals and feeds containing animal protein must be labelled as containing 'restricted animal material'. For example the Queensland regulation is that feeds containing rendered animal products are labelled 'This product contains restricted animal material – DO NOT FEED TO CATTLE, SHEEP, GOATS, DEER OR OTHER RUMINANTS'. Other States are expected to impose the same labelling requirements.

## Meatbiz

- Wayne Horsell and partners have set up the new on-line trading company Meatbiz. Wayne has joined with other meat trading specialists to provide an interactive trading web site. The web site is at <www.meatbiz.com.au> or contact Wayne on 08 9315 2956 to find out about trading on the Meatbiz web site.

## Diary Dates

### Accreditation workshop

The ARA's thirteenth workshop on Hygienic Production of Rendered Animal Products will be held at the University of Western Sydney, Richmond NSW on 17–22 February 2001. The ARA and the University of Western Sydney will accredit people who successfully complete the workshop. Accreditation will be one way of demonstrating compliance with the Australian Standard for Rendering requirement for rendering plants to have training programs.

### ARA Meeting

The November meeting of the ARA will be held at the Hilton Hotel at Sydney Airport on 16 November with a dinner on the evening of 15 November. David Smith of CSIRO will address the meeting about ideas for promoting meat meal in aquaculture. David has been to Thailand to discuss the use of MBM in aqua-feedsm with CP nutritionists and will report his findings to the ARA. Lewe Atkinson will also address the meeting about MLA support for a strategic plan for R & D in the rendering industry.

If you plan to attend the meeting, make your booking for accommodation with the Hilton on 02 9518 2000.

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