

News



Volume 14 / No. 1
Spring 2009



VICTAM
Asia 2010



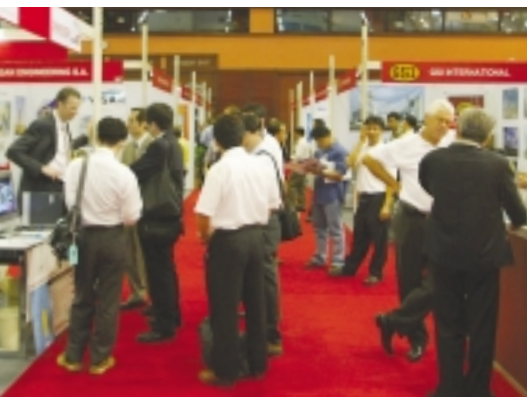
FIAAP
Asia 2010



grapas
asia 2010

2010 events in Asia ahead of schedule!

Despite the economic downturn and other problems **VICTAM Asia**, **FIAAP Asia** and the newly introduced **GRAPAS Asia 2010** are ahead in both the number of exhibitors and the m²'s reserved at the same time as our last shows in 2008.



Exhibitors are taking advantage of the platform provided by these three important trade shows to capitalise on the economic recovery and growth that is expected by next spring.

These three trade shows are ideally timed so as to attract and influence the senior trade executives from within these industry sectors who will visit the shows and attend the series of technical conferences and workshops that will be held alongside the shows.

Asia and South East Asia with their less exposed economies will be able to "bounce" back more quickly and so trade shows where so many industry buyers can meet under the same roof with their suppliers is a great bonus and incentive.

There will also be an additional incentive for visitors to come to Bangkok in 2010: it is not just the feed industry that is being focused on with VICTAM and FIAAP Asia, but also rice and flour milling, grain processing and storage, industrial noodle and pasta production, breakfast cereal and extruded snack production. These industry sectors now have their own

dedicated exhibition and conference – GRAPAS Asia 2010.

GRAPAS Asia will complete the series of exhibitions giving rise to our theme – "A Partnership in Synergy". This will undoubtedly help the event to build on the great success of the last event in 2008. VICTAM Asia and FIAAP Asia 2008 attracted over 6,000 trade visitors, and these senior executives came from 69 different countries. This visitor figure is almost double that of the previous show in 2006!

All three exhibitions will now be officially supported by the Thailand Convention & Exhibition Bureau. This support gives greater access to Government Departments, senior officials and even Government Ministers. The extensive activities of the Bureau (TCEB) assist us as organizers in promoting the events both within Thailand and elsewhere within the Asia/Pacific markets. TCEB also offers additional benefits, such as organizing fast track immigration facilities at Bangkok International Airport for exhibitors, conference delegates and visitors.

VICTAM Asia 2010 · **FIAAP Asia 2010** · **GRAPAS Asia 2010**
"A Partnership in Synergy...Your Key to Success"
3 – 5 March 2010 · Queen Sirikit National Convention Center, Bangkok, Thailand

It's the mix that makes the difference. Feed manufacturers demand high mixing accuracy, efficiency and sanitation from a mixing process. Customer value is Buhler's first priority. Buhler commits itself to delivering mixing solutions with high mixing accuracy and increased efficiency. Instead of 10 mixing cycles per hour as other machines, the Speedmix achieves 20 mixing cycles per hour with top sanitation. Combine with a complete feed plant process design, key equipment and automation - for the perfect mix. www.buhlergroup.com



The solution behind the solution.

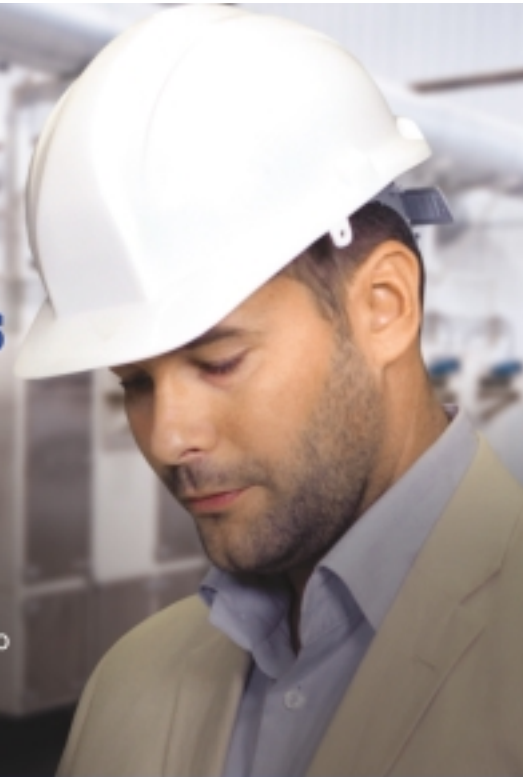


Energy consumption down 25%.
Optimizing quality and volume.

**“Extru-Tech® has given us
a true advantage.”**

Reduced energy consumption. Higher production volume. Improved finished product quality. They're all typical comments of petfood producers that have consulted with Extru-Tech® to achieve best in market process solutions.

At Extru-Tech, we're determined to elevate the industry's production to higher levels, using less energy. By utilizing our collective resources, we're engineering the next generation of petfood processing today. Now that's innovation driven by Extru-Tech.



Corporate Office

P.O. Box 8 • 100 Airport Road • Sabetha, KS 66534, USA
Phone: 785-284-2153 • Fax: 785-284-3143
extru-techinc@extru-techinc.com • www.extru-techinc.com



All three shows will be held at the prestigious Queen Sirikit National Convention Center in Bangkok.

NEW GRAPAS Asia 2010 Exhibition and Conference

GRAPAS Asia, the new affiliated event to the Victam Exhibitions & Conferences, will be the first specialized international trade show for the suppliers of equipment, technology and ingredients for Rice & Flour Milling, Grain Processing, Industrial Noodle & Pasta Processing, Breakfast Cereal and Extruded Snack Production.

This new exhibition will concentrate on the entire process; from the intake and storage of grain and rice to the milling and processing and packaging for human food products.

With the increasing consumption of Western-style baked products, new Government initiatives for the rice industry in Thailand and the added importance of grain-derived bio-energy the South-East Asian market needs an exhibition and conference of its own.

GRAPAS Asia 2010 will be that event,

showcasing the largest players in the industry; Bühler AG Grain Milling, Altuntas AS and Jiangsu Muyang Group Co., Ltd., to name but a few.

GRAPAS Asia 2010 will be held in conjunction with the GRAPAS Asia Conference 2010 and a series of commercial presentations.

GRAPAS Asia 2010 is supported by: Thai Ministry of Agriculture & Co-Operatives, Thai Rice Milling Association, Thai Chamber of Commerce, Thailand Convention & Exhibition Bureau.

grapas²⁰¹⁰
asia

The Event for Rice & Flour Milling, Grain Processing, Industrial Noodle and Pasta Processing, Breakfast Cereal & Extruded Snack Production

"A PARTNERSHIP IN SYNERGY"

Queen Sirikit National Convention Center
Bangkok · Thailand · 3 – 5 March 2010

FIRST ANNOUNCEMENT



March 3, 2010

March 4, 2010

March 5, 2010

Three conferences—one big occasion

During Victam Asia 2010, Bangkok, Thailand

“Optimize for Profit”

AQUAFEED HORIZONS ASIA attracts senior-level technical and management staff from the aquafeed sector from throughout the Asia Pacific region and beyond.

This, the fourth Aquafeed Horizons conference to be held in association with Victam International, comes at a crucial time for the aquafeed sector:

The industry faces uncertain market conditions, ingredient cost and availability as well as changing customer demands.

Aquafeed Horizons Asia will provide aquafeed producers and the allied industries with information to help them adapt, improve and innovate to stay ahead. Topics will include:

- Formulation and ingredients
 - Processing technology
 - Quality control

“Ingredients for Success!”

THE FIAAP CONFERENCE is the specialty conference for feed ingredients and additives in the Asia Pacific region.

The 2nd FIAAP Conference will deliver an expert level of technical information for the commercial feed industry in Asia Pacific.

An international group of acclaimed speakers will discuss feed ingredients and additives that will help animal feed and aquafeed producers grasp the opportunities and meet the challenges they face in delivering safe, nutritious diets to the world's livestock farmers.

Topics will include:

- Utilizing ingredient technologies for profitability in commercial feed mills
- Protein availability & quality
- Ingredient evaluation

“Quality Matters!”

THE GRAPAS CONFERENCE is a new event, to be held in association with the GRAPAS Asia trade show, part of Victam Asia 2010. It has been created to cater to the grain-based industries throughout Asia Pacific.

The GRAPAS Conference will address grain quality issues facing the feed and food grain processing and handling industries, particularly in Asia and the Pacific region.

International experts will discuss grain and oilseed quality control to assure sanitation and preservation during storage, handling and transportation.

Topics will include:

- Mycotoxins control
- Elimination of pathogens
- Grain preservation technologies

Information subject to change.
See website for current details.

More information: www.feedconferences.com

LINX CONFERENCES



VICTAM Asia 2010

Exhibition and Conferences

VICTAM Asia is undoubtedly the largest exhibition within South & South East Asia for the animal feed processing industry. Exhibitors participate from all over the world as well as from Thailand itself. Visitors will find, as always, a vast array of equipment and technology that is used within the feed milling process: pellet mills, extruders, dryers, conditioners, quality control, conveyors, silos, bagging, etc.

The selection of technology is impressive as are the names of the exhibitors which participate, these include: Andritz Feed & Biofuel, Bühler, Extru-Tech, Jiangsu Muyang Group Co., Ltd., Wenger, Zhengchang, to name but a few.

Besides the conventional systems used within animal feed mills there will also be specialist equipment used in the manufacture of dry petfood and also aquafeed, both for finfish and shrimp. The growth of these two specialist industry sectors within South East Asia over the recent few years has been substantial. These two increasingly important industry sectors will also have their own dedicated conferences and workshops.

As you will have already read, VICTAM will be co-located with GRAPAS Asia in 2010. This is beneficial to both visitors as well as many of the exhibitors. Much of the ancillary equipment and technology used within animal feed mills is also used within flour and rice mills and grain processing plants: magnetic systems, conveyors, silos, elevators, bags and bagging machines, trucks, etc. Therefore companies exhibiting these products will enjoy an array of international visitors from a large and varied number of sectors.

Another industry sector that is being introduced is from the new and expanding subject of biomass. This is an increasingly important industry sector for many of our exhibitors and also to many municipal authorities as they struggle with increasing amounts of organic waste. Systems are being developed to pelletise this waste and to use it as an alternative energy source. As national and international regulations on toxic emissions become more stringent so the importance of low cost, lower emission energy sources increases. Biomass is one of these. This subject will also be covered by a technical conference during VICTAM Asia 2010.

VICTAM Asia 2010 is held in conjunction with FIAAP Asia Conference, GRAPAS Asia Conference, Petfood Forum Asia, Aquafeed Horizons, Thai Animal Feed Conference, Biomass Asia Conference and a series of commercial presentations.

VICTAM Asia 2010 is supported by: Thai Ministry of Agriculture & Co-Operatives, Thai Department of Livestock Development, Thai Department of Fisheries, Thai Feed Mill Association, Thai Petfood Association, Thai Chamber of Commerce, Thailand Convention & Exhibition Bureau.

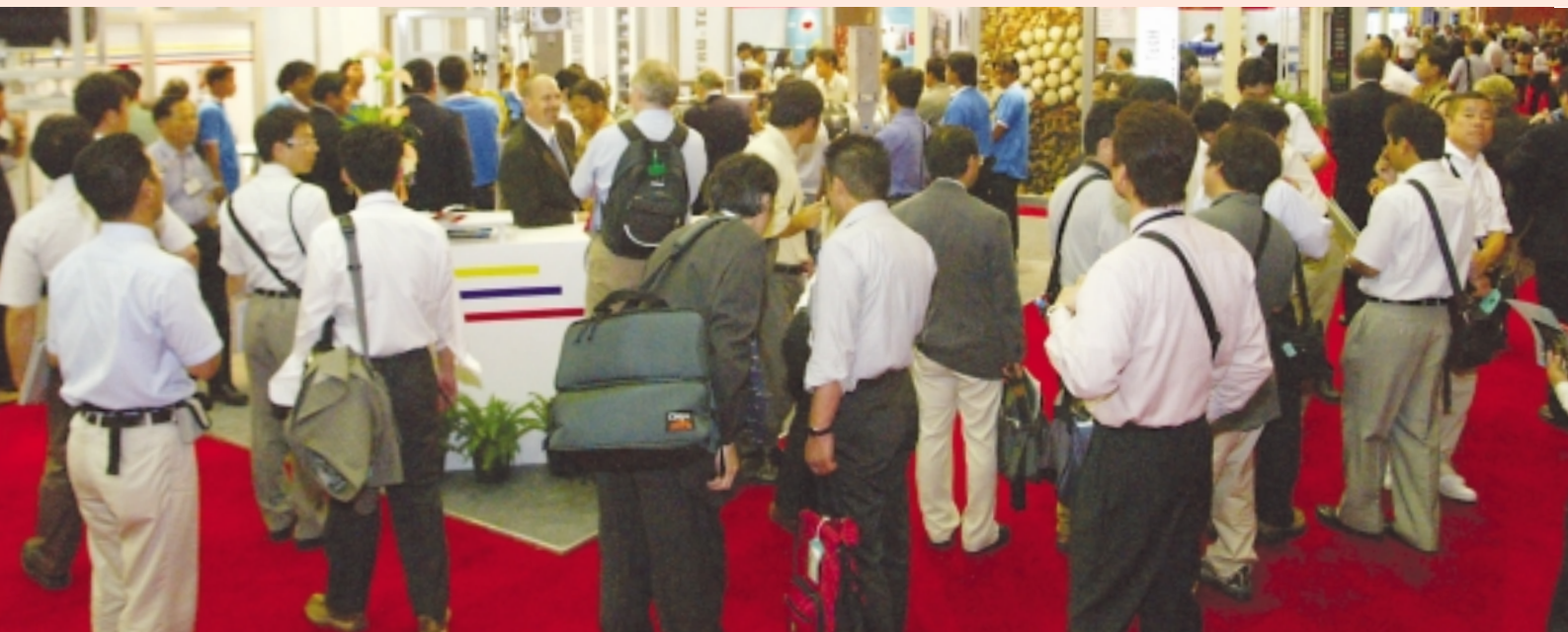



VICTAM
Asia 2010

Asia Pacific's Premier Event for
the Animal & Aquatic Feed,
Petfood and Biomass Technology

"A PARTNERSHIP IN SYNERGY"

Queen Sirikit National Convention Center
Bangkok · Thailand · 3 – 5 March 2010





FIAAP Asia 2010

Exhibition and Conferences

FIAAP Asia 2010 is the perfect partner as a co-located trade show and series of conferences for VICTAM Asia. FIAAP is the trade show for ingredients, additives and formulation technology required to produce, safe, nutritious, healthy and cost effective feeds for animals, fish, shrimp and dry petfood.

This exhibition and series of technical conferences and workshops was first introduced to the market in 2008. It was an instant success.

International companies such as Biomin, DSM, Novus, Format, Adifo, immediately saw the advantage of the co-location of the two events as it meant they would be able to meet a number of senior personnel from within the same client. What better than to sit down with the senior nutritionist/formulator AND the mill/production manager AND CEO to discuss your products in depth? This is what happened.

Of course the inclusion of specialist conferences also on animal feed ingredients, on aquafeed and on petfood meant that senior executives from feed production plants throughout South and South East Asia, and even the Middle East attended in strength.

No other show in the Asia/Pacific market can provide a higher concentration of senior specialist visitors within the animal feed, dry petfood and aquafeed arenas and such offers exhibiting companies the

ideal opportunity to present their products and services to this unique highly targeted audience.

FIAAP Asia will also be co-located with GRAPAS Asia. Once again there is a synergy within the events as GRAPAS Asia is a specialist grain processing event. Grain is one of THE basic raw ingredients used within animal feeds.

We only have to look back to 2007/8 and the rocketing prices for grain and the impact upon feed compounders and producers and their end products to see the importance of this commodity.

FIAAP Asia 2010 is held in conjunction with FIAAP Asia Conference, Petfood Forum Asia, Aquafeed Horizons, Thai Animal Feed Conference and a series of commercial presentations.

FIAAP Asia 2010 is supported by: Thai Ministry of Agriculture & Co-Operatives, Thai Department of Livestock Development, Thai Department of Fisheries, Thai Feed Mill Association, Thai Petfood Association, Thai Chamber of Commerce, Thailand Convention & Exhibition Bureau.




FIAAP
Asia 2010

The Feed Ingredient, Additives & Formulation Event for the Asia Pacific Region

"A PARTNERSHIP IN SYNERGY"

Queen Sirikit National Convention Center
Bangkok · Thailand · 3 – 5 March 2010



Extensive series of Conferences & Workshops supporting the event

Visitors to the shows will also have the opportunity to attend some of the technical conferences, workshops and commercial presentations that will take place during VICTAM Asia, FIAAP Asia and GRAPAS Asia. These will include:

- **The GRAPAS Conference**
Organized by Linx Conferences
- **The FIAAP Conference**
Organized by Linx Conferences
- **Petfood Forum Asia 2010**
Organized by Watt Publishing, publishers of Petfood Industry magazine
- **Biomass – Pellets Update**
Organized by Bioenergy International magazine
- **The Aquafeed Workshop**
Organized by Linx Conferences
- **The Thai Feed Conference 2010**
Organized by the Thai Department of Livestock in conjunction with the Thai Feed Mill Association.

You will find further details on these and the industries they serve in the next few pages.



Aquafeed Horizons, FIAAP and GRAPAS Conferences help keep the industry one step ahead

Aquafeed Horizons Asia returns once again to Bangkok, March 3, 2010, as part of the region's most important feed industry trade show, VICTAM Asia, at the Queen Sirikit National Convention Center. This will be the 4th Aquafeed Conference to be held in association with Victam, and the third in Bangkok.

Aquafeed Horizons Asia attracts senior-level technical and management staff from the aquafeed sector from throughout the Asia Pacific region and farther afield. The conference will deliver an expert level of technical information to meet the needs of the commercial aquafeed industry in Asia Pacific. Speakers, including Dr. Andrew Jackson, Technical Director, IFFO, Dr. Geoff Allen, Research Leader, Aquaculture Director, Port Stephens Fisheries Centre, NSW Department of Primary Industries, Australia, Dr. Brett Glencross, Principal Research Scientist – Aquaculture Nutrition, CSIRO Marine and Atmospheric Research, Australia, Dr. Peter Coutteau, Inve Nutri-Ad and others will discuss topics ranging from harvesting the benefits of grain application in aquafeeds, fishmeal quality for aquafeeds, the use of rendered products in aquaculture, innovative approaches to stabilizing formulation cost and performance of aquafeeds as well as processing technology.

Once again the specialty conference for ingredients and additives for animal feed production in the Asia Pacific region, **FIAAP Conference 2010**, will be run on the day following Aquafeed Horizons, March 4, 2010. An international group of acclaimed speakers, including Dr. Andrew Jackson, Technical Director, IFFO, John Spragg, Australian Pork Co-operative Research Centre AusScan Project Manager and others will discuss rapid analysis prediction of available energy in feed grains, fishmeal availability and demand, innovative feed ingredients and additives and applications to help meet the challenges faced by today's animal and aquatic feed producers to deliver safe, nutritious diets to the world's livestock farmers.

A new conference has been organized on the third day of the Victam show, **GRAPAS Conference 2010**. This meeting will support a new trade show for the grain-based industries at VICTAM Asia and will focus on grain quality, particularly grain sanitation and preservation. Because grain is at the heart of the feed industry, the GRAPAS conference has been scheduled so that there is no conflict with the feed ingredients and additives conference, FIAAP or the aquafeed conference, Aquafeed Horizons. In fact delegates who want to attend two or all three conferences will benefit from generously discounted rates.

For more information and to register, visit www.feedconferences.com

Worldwide promotion for VICTAM Asia, FIAAP Asia and GRAPAS Asia

All three events will be heavily promoted throughout the world, but especially within South and South East Asia. This will include:

- Advertising in industry related magazines and websites – show specific
- Advertising in international digital magazines – show specific
- Frequent press releases
- Press conferences
- Press invitations
- Direct mail
- Radio interviews and advertising
- Television interviews and advertising
- Road-shows within Asia/Pacific region
- Local Ministerial involvement
- Internet promotions
- Links to related websites
- Magazine features and previews
- Local and international newspaper promotions
- Promotional bulletins
- Promotional competitions
- Special editions of VICTAM News
- Websites@ www.victam.com, www.fiaap.com and www.grapas.eu



Grain quality conference to debut at VICTAM Asia

A new one-day conference for the grain industries will take place March 5, 2010 in association with VICTAM Asia 2010 and the new GRAPAS Asia 2010 grain industry show.

The GRAPAS Conference will reflect the grain quality-related interests of visitors to the VICTAM Asia trade show, with an emphasis on grain preservation and sanitation, which are crucial issues for both the animal feed and grain-based food industries in the region.

Because grain is at the heart of the feed industry, the GRAPAS conference has been scheduled so that there is no conflict with the feed ingredients and additives conference, FIAAP or the aquafeed conference, Aquafeed Horizons. In fact

delegates who want to attend two or all three conferences will benefit from generously discounted rates.

"We are very aware of the economic climate and want to make our meetings as available as possible to everyone who wants to attend," said the organizer, Suzi Fraser Dominy.

"We have built in a number of ways for people to save on registration: as well as savings on attendance at two of the conferences we are running – and even more on all three – delegates can make additional savings by booking early. On top of that we have lowered the qualification for group bookings – now if just three delegates book together, they will enjoy a further discount".

Program details as well as registration will be available shortly from the conference website: www.feedconferences.com, where you can also leave your email address to be notified.

Call for papers

The call for papers for the GRAPAS conference will close June 30, 2009. Qualified experts are invited to submit presentations for consideration on the following topics: Mycotoxin control; Pathogen elimination; Pest control; Grain preservation; Quality monitoring and assessment. A "Presentation Submission" form may be downloaded from the conference website at: www.feedconferences.com



Are you involved with the Feed & Grain industries?
Are you looking to expand your activities?

Maybe you can work with us! We are...



VICTAM

**THE WORLD'S FOREMOST ORGANISERS OF TRADE
EXHIBITIONS FOR THE FEED & GRAIN INDUSTRIES**

We are looking for individual sales consultants in the following areas to assist us in exhibition space sales, marketing and visitor promotion – Japan, Middle East, South America, Brazil, Turkey, Spain, Indonesia, Scandinavia, Malaysia, India, Ukraine, Philippines and Vietnam.

Contact us and see how you could be part of our successful team.



VICTAM
International

Please send CV and full details to:

Henk van de Bunt

Victam International

Tel: ++ 31 33 246 4404

Fax: ++ 31 33 246 4706

Email: Expo@victam.com

Visit us on: www.victam.com

Petfood Forum Asia returns

Continued rapid growth in Asian petfood markets spurs

As a region, Asia Pacific has seen nearly 20% growth in petfood sales over the past five years (2003-2008), and Euromonitor International projects the region to grow even more – almost 23% through 2013. *By Debbie Phillips-Donaldson*

Some individual petfood markets within Asia will rise at an even higher rate, Euromonitor says, with Thailand increasing the most at 75% overall and a compound annual growth rate (CAGR) of 12%. (See table below)



Against that backdrop of sizzling growth, the second edition of Petfood Forum Asia will take place in Bangkok, Thailand, on March 3, 2010, providing information and knowledge from the industry's leading experts to help regional petfood manufacturers and marketers manage, guide and sustain increasing sales. Petfood Forum Asia will be held at the Queen Sirikit National Convention Center in conjunction with VICTAM Asia 2010.

Asia Pacific: highest growth areas
While Japan is still the largest petfood market in Asia, its growth rate for the past five years and likely for the next five follows that of other developed markets, between 2% to 3% CAGR. Hong Kong is similar, though growing slightly higher at 3% to 6% CAGR.

Most other markets in Asia Pacific are growing at a much greater CAGR of 6% to 12%. In fact, Thailand grew at nearly 17% CAGR from 2003 to 2008, so Euromonitor's projection of the country's 12% CAGR through 2013 represents a slight slowdown.

When you compare Asia Pacific to the rest of the global petfood market, its strong growth pushes it to the front of the world stage. Among the 10 fastest growing petfood markets by 2013, according to Euromonitor, Asia Pacific will account for five: Thailand, India, Indonesia, China and South Korea. Thailand will be the second only to Russia in terms of growth, with India fourth. (Romania will come in third.)

Euromonitor identifies two common reasons for this growth:

1. Changing demographics in emerging markets, including increasing pet ownership;
2. Large gaps between the number of cats and dogs owned and the amount of prepared petfoods fed, creating opportunity for petfood companies.

Petfood Forum Asia: building on success

Petfood Forum Asia seeks to help players in the rising Asia Pacific petfood market grow even more by sharing knowledge and information on key industry drivers such as the human-pet bond, convenience and health and wellness trends.

Though Petfood Forum has been an annual and very successful event in the US since 1993, the only other region the conference had appeared in before 2008 was Europe. Petfood Forum Asia debuted in 2008 in conjunction with VICTAM Asia. Despite being brand new to that event as well as to the Asia Pacific region, the first edition of Petfood Forum Asia drew more

than 120 participants needing to know more about the petfood industry and important components such as nutrition and ingredients, processing, safety and retailing.

Coming soon: call for papers
With the global petfood market expected to be even larger by 2010 – and with the projected growth in Asia in particular – we hope for even greater interest in these topics and others presented as part of Petfood Forum Asia 2010. To ensure the conference includes information of the highest value to the industry, we will conduct a call for papers inviting potential speakers to submit abstracts of proposed presentations.

Please watch PetfoodIndustry.com for guidelines for submitting abstracts, as well as more information about the conference in the coming months.

● Article by Debbie Phillips-Donaldson, editor-in-chief, Petfood Industry/ Petfood Forum

▼ **Table below:**
Asia Pacific Petfood Market, 2003-2013
Euromonitor's sales figures for dog and cat food from 2003 to 2008, plus projected sales through 2013, show the Asia Pacific region and its individual markets will continue to grow at a strong overall percentage and compound annual growth rate (CAGR).

Country	Sales in US\$ millions			% growth 2003 – 2008	% growth 2008 – 2013	CAGR% 2003 – 2008	CAGR% 2008 – 2013*
	2003	2008	2013*				
Asia Pacific total	3,358.1	4,753.1	5,821.3	19.6%	22.5%	3.6%	4.1%
China	90.4	265.3	407.5	72.1%	53.6%	11.5%	9.0%
Hong Kong, China	46.8	56.4	75.4	18.3%	33.7%	3.4%	6.0%
Japan	2,876.7	3,596.2	4,089.1	10.7%	13.7%	2.1%	2.6%
Malaysia	34.0	60.4	85.5	36.0%	41.6%	6.3%	7.2%
Singapore	20.4	38.2	43.2	39.3%	13.1%	6.9%	2.5%
South Korea	60.1	213.1	325.7	46.9%	52.8%	8.0%	8.9%
Taiwan	147.4	195.7	233.8	34.1%	19.5%	6.0%	3.6%
Thailand	42.3	221.4	386.9	117.9%	74.7%	16.9%	11.8%
Other Asia Pacific	8.0	34.0	58.7	86.2%	72.4%	13.2%	11.5%



to Bangkok

interest in industry knowledge



The Thai Feed Conference 2010

Once again the Thai Department of Livestock, part of the Ministry of Agriculture & Co-Operatives, and in conjunction with the Thai Feed Mill Association will organize a one day conference.

This popular and well respected conference has been organized for a number of years and has been growing in the number of delegates it has attracted. Over 160 delegates attended the 2008 conference.

The conference subject or theme has varied but it always considers conditions, problems and new regulations facing the Thai feed industry, whether it be for the animal, aquafeed or petfood sector.

The subject of the 2010 conference is still under consideration. However once we know we will publish it.

Please note this conference is presented and conducted in Thai.



Bioenergy International Pellets Update at VICTAM Asia 2010

Pellets – a great way to make biomass resources available for local and global energy markets

The message of the world is that the United Nations environmental goals from Rio de Janeiro, Kyoto, and now coming up in November 2009 in Copenhagen, cannot be reached without a large amount of bioenergy replacing fossil fuels. Replacement is not possible without an enormous, at least 10 times, increase in the use of pellets. Already today pellet consumption is as large as 8 million tons per year. Without the large amount of energy pellets provide, markets will be out of reach for biofuels.

Why do we need pellets?

Fresh biomass in forms of wood logs, chips or crushed biomass are often very good fuels but transport and handling costs could become high, along with the investments cost for the user. Often you can get into environmental difficulties because of transportation, noise in sensitive areas and the bad quality of burning.

By converting the biomass into pellets you will be able to use automatic pellet stoves in your home, industry, hospitals, schools etc. Biomass can be used with high efficiency, high availability and with automatic systems and for the very large units like the coal powder power plants. Pellets can be co-fired in wood powder burners with very good results. Huge power plants in Belgium, Holland, Denmark, Sweden, Italy and other countries have been using pellets for many years, often co-firing with coal.

Pellets are also a global fuel

Pellets are today transported from western Canada through the Panama Canal to large users in Europe. Also pellets are produced in South Africa and Australia for these markets. This has been going on for almost ten years now and the market increases every year.

Worldwide large biomass resources are not used today, partly because they have not found a market or because they are expensive to use. But if they are transferred to pellets suddenly the cost for use will decrease radically.

Certificate of origin

Of great importance for the end user is that the fuels used are environmentally and sustainably produced. For this reason certification systems have become of importance. But this could be a difficult matter to handle if one does not understand the methods.





Skills in production

If you know the methods, have good raw material and equipment then pellets can be produced quite easily but often this is not the situation. Raw material could be complicated, ash content could be high as an example. The geometry of the dies, speed, pressure temperature etc must be correct for the production chosen. Without proper knowledge maintenance costs could be high and plant capacity could be low.

Discussion Topics: Bioenergy International Pellets Update Bangkok

This one day conference will give a fast update to global and local markets, resources and technology from an Asian perspective.

We will look into details regarding the situation and the world class speakers will come from the business itself.

Program structure · March 4, 2010

A) Introduction

- Introduction to the global pellets market, the pellets map, historical perspective and trends for the future
- A global company's use of pellets

B) Resources and certificates

- World-wide resources and trade routes for biomass
- Resources, certification system etc

C) Large pellets mills and users

- Experience from Sweden, USA and East Asia

D) Small and medium sized pellets production, business and use

- From the smallest to a medium size scale

E) Pellets production technology examples, representatives from the business

- Technology available and lessons learned

F) Final Discussion

Comment: Depending of the interest from the speakers, the balance between sessions can change. Please check program update at the following websites: www.victam.com or www.bioenergyinternational.com Bioenergi Förlag with magazines Bioenergy International and Kretslopp, www.bioenergyinternational.com and www.novator.se

PROGRAM



Asia Pacific's economy continues to grow in spite of global recession

Even at a slowed rate of growth, Asia Pacific still offers opportunity for the feed and food industries but also presents challenges

It is a brave person who would try to predict with any certainty the state of the world economy by March 2010, when VICTAM Asia is due to take place. While we scan the news media for signs of an economic recovery, it is hard to see past the gloomy headlines and even harder to find any consensus of (informed) opinion. However, it seems that there is agreement that we are at least in the right industry – and in the right location.

By Suzi Fraser Dominy

A recently released report¹ from a sound and proven source (the Office of the Chief Economist World Agricultural Outlook Board, The United States Department of Agriculture) paints a modestly optimistic picture of what we might expect, albeit couched in terms of caution and barring unforeseen calamity: while the very strong economic growth rates seen in Southeast Asia since the beginning of the '70s may be over, the report projects annual economic growth for the region approaching 5 percent over the next several years.

In the developing countries, the report suggests that economic growth will average 5.6 percent annually during 2009 – 18.

Continued strong growth in Asia as a whole, makes this region an increasingly important part of the global economy, with Asia's share of world GDP rising to almost 30 percent by the end of the

projection period. Relatively high oil prices, by historical standards, assumed in the projections constrain Asia from even higher economic growth.

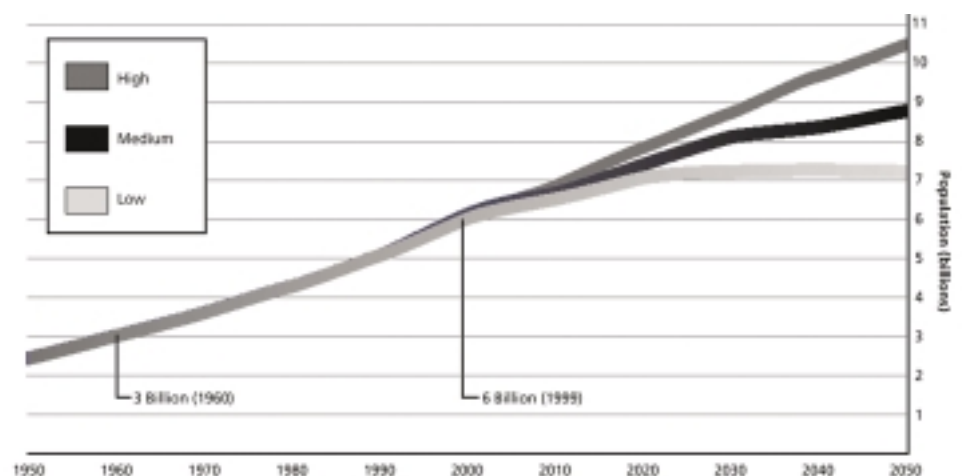
The banking sector too is demonstrating confidence in the region: for example, local papers recently reported that one of Thailand's largest banks, BusinessSiam Commercial Bank, has halted its expansion plans in China and will instead concentrate on expanding its operations within Southeast Asia.

The bank recently subscribed to a rights issue by VinaSiam Bank to help maintain SCB's shareholding at 33%. VinaSiam, the largest bank in Vietnam, is a joint venture 34% held by the Vietnam Bank for Agriculture and Rural Development and 33% each by SCB and the Charoen Pokphand Group.

The Vietnamese market is seen as still offering strong growth potential, in spite of the effects of the global downturn.

▼ Graph below:

World Population Growth, actual and projected, 1950 – 2050



Source: United Nations. 1998. World Population Prospects (The 1998 Revision)



Photo: The U.S. Department of Energy

Opportunity and challenge

It is well established that as incomes rise, population tends to become more urbanized, consumers generally diversify their diets, moving away from staple foods to include more meat, dairy products and processed foods, including vegetable oils, and require higher quality. These consumption shifts will continue to increase demand for both local and imported feedstuffs as well as high-value food products. On top of this, increased demand will also be driven by population growth.

Good news for us it would seem. But we must look further ahead and ask where the materials to make all this feed will come from. In China alone, it is predicted that annual meat consumption will increase from approximately 50 kg per person to 70 kg over the next 20 years. This extra 20 kg of meat will require an additional 320 million tons of feed.

At an FAO poultry meeting² at the end of 2007, attendees heard that as a whole, Asia in 2015 will represent more than 60 percent of the global population, more than 70 percent of global pork consumption, and more than 35 percent of global chicken consumption, requiring approximately 391 million tons of pig and poultry feed. Even if the largest producers of grains such as Brazil, Argentina, the United States of America and Ukraine could double grain production, there would still be insufficient feed available to

deliver the extra 20 kg of meat to China, let alone to meet the needs of Asia as a whole – and that does not even take into account aquaculture.

Add to the equation the competition for grain from the bio-fuel sector and it is clear that the feed industry must actively seek alternative ingredients. At the meeting it was postulated that tomorrow's feed solutions lie in by-product utilization: vegetable by-products from rice and wheat; oilseed meals, such as soy, rapeseed, coconut, palm; starch/distilling by-products (DDGS, cassava residue, sweet potato, wheat/sorghum) and other novel plant materials and by-products.

Increased utilization of by-products will in turn drive development and use of feed additives such as mycotoxin inhibitors, and enzymes to deal with the anti-nutritional factors and other digestibility issues presented by some of these ingredients. New processing know-how and technologies will also have to be developed to efficiently incorporate these ingredients.

In short, the dynamic nature of Asia Pacific's feed and grain market will make it as important as ever to be on top of your business game – even in an economic slowdown.

1 USDA Agricultural Projections to 2018 (OCE-2009-1) available online from www.ntis.gov.

2 Poultry in the 21st century: Avian influenza and beyond – International Poultry Conference Bangkok, November 2007

In China alone, it is predicted that annual meat consumption will increase from approximately 50 kg per person to 70 kg over the next 20 years. This extra 20 kg of meat will require an additional 320 million tons of feed

● About the author

Suzi Fraser Dominy has been a feed industry writer and publisher for more than 20 years and has held senior positions or written columns for most of the best known international feed and grain publications. She is the president of Aquafeed.com, the aquaculture feed industry information provider and animal feed industry publisher, Linx Publishing. These two companies have joined forces to form Linx Conferences, which at VICTAM 2010 will hold three one-day meetings: The FIAAP Conference, Aquafeed Horizons and the GRAPAS Conference. Visit www.feedconferences.com for more information on these meetings.

Get the latest global feed news into your e-mailbox each week!



Sign up now at www.AllAboutFeed.net



New name
- same reliable
business partner!

ANDRITZ
Feed & Biofuel

Pelleting or Extrusion

Superior performance,
quality and controllability



Extruder 1250 with Flextex
and ECS plus
Pelletmill PM1219 with
CM conditioner

Your leading global supplier
of technology and solutions
for the animal, petfood and
aqua feed industry

www.andritz.com
andritz-fb@andritz.com

GLOBAL PRESENCE

Denmark · Netherlands · Germany · France · UK · USA
Venezuela · Brazil · Chile · Mexico · Australia · R.P. China

Victam launches upgraded website

The new Victam website has now been launched. Still at the same address – www.victam.com, put it down as a favourite, now!

You will find the latest information on our shows and all the conferences – VICTAM Asia 2010, FIAAP Asia 2010 & GRAPAS Asia 2010. Information on how to exhibit at these shows, there will be links to the conference secretariats, visitor pre-registration accommodation and travel for Bangkok, etc.

The Press will find an area for them with additional information, Press Releases, statistics and photographs, etc.

You will also be able to visit the Victam Directory, which has also been upgraded.

Take a look – www.victam.com

The new Victam Directory @ www.victam.com

Like the Victam website, our classified directory of suppliers to the industries we serve has been re-designed and upgraded.

This comprehensive directory has a selection of easy search methods to help the reader find exactly what he needs – quickly.

You will find new extended category listings and much more. Is your company listed? – check www.victam.com and see, if not you will find a button to complete our online application form.

It only costs €100.00 per year, that's about US \$130.00.

Why not sit back with a cup of coffee and look at the directory and see how it will help with your company's promotion.



New Microwave Moisture and Density Measuring Systems from TEWS Elektronik for the food and feed industry

We offer system for the food industry (cracker, grain, dried products, noodles, soups etc) and for the feed industry (pet food, seeds, pellets, aquafeed).

Knowing the moisture and density in the running production process of dry pet food products is very important.

The moisture content is limited to 15% because the higher the moisture is the lower is the shelf life. The density measurement is also important because i.e. for fish food it must be ensured that the pellets swim or sink depending on the type of fish that has to be fed.

TEWS Elektronik systems allow parallel online measurement of moisture and density in the running pet food production process. The systems are fast, accurate, easy to operate and need no maintenance.

The new series MW 4XXX and MW 11XX are just released!

● *Please visit our homepage and contact us for more information:*
www.tews-elektronik.com/en



Fatten up your bottom line

Buhler high-performance animal and aqua feed production systems are used by leading companies around the world. These producers know they can rely not just on the technology itself, but also on the support that accompanies it. A service combining local presence with global expertise both lowers feed mill operating costs and increases capacity utilization.

Since 1860 Buhler has been supplying its customers with complete process design packages, reliable machinery, advanced technology, automation, training courses and customer service. We deliver Process Engineering and Machines for: intake, storage, cleaning, proportioning, weighing, grinding, mixing, homogenizing, cooking, compacting, pelleting / extrusion, cooling, screening, coating, bagging, pelletizing, materials handling, aspiration, process control systems, automation for the feed and aqua feed industry.

The star in the feed mill is the pellet mill. Buhler's HYSYS is the ultimate feed production engine. Feed manufacturers are under intense pressure to produce safe, high-quality feed at a lower cost. The HYSYS sanitizing and pelleting system from Buhler delivers a new standard in meeting the needs of feed mills. With new levels of feed safety and pellet quality, HYSYS gives you more of what millers demand.

Buhler solutions are utilized to produce: healthy and professionally produced animal feeds ensuring balanced nutrition of livestock, sinking and floating aquaculture feeds for fish or crustaceans, homogeneous, recipe-compliant, and contamination-free premixes, and dry feeds for pets such as dogs, cats, hamsters, horses, birds, ornamental fish, and others.

Buhler is focused on delivering cost effective technical solutions that produce the highest quality feed in the industry. The Buhler brand is a sign of trust for ultimate availability and durability. The result – is higher operation performance that stands the wear of time. So the question is not whether you can afford to choose Buhler – it's how a solution from Buhler will feed your profits.

● *For more information please visit www.buhlergroup.com*



Tapco Adds Western 3-Prong Elevator Bolt to Existing Product Line

Tapco Inc., an industry-leading manufacturer of elevator buckets and elevator bolts, recently added the Western 3-Prong bolt to its product line. Tapco's new Western 3-Prong bolt joins existing styles: No. 1 Norway Flat Countersunk, No. 3 Eclipse (Slotted), Fanged, and Pointed Fanged.

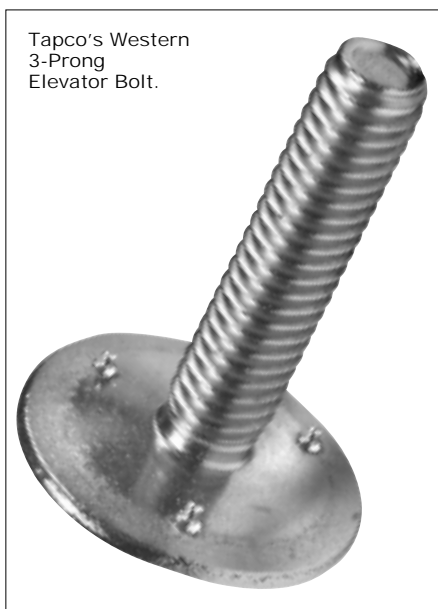
The Western 3-Prong bolt, historically used in Western Canada, is available worldwide. It offers resistance, engagement and strength at a cost-effective price. Tapco is the only company that stocks the Western 3-Prong bolt in stainless steel.

Tapco offers the largest selection of elevator bolts in North America with an inventory of more than 14 million pieces in 38 sizes in three materials: Carbon steel, Zinc plated, Stainless steel. Thread sizes include 1/4"-20", 5/16"-18", 3/8"-16", 1/2"-13". M6, M8 and M10 are stocked in various lengths.

In-house quality control guarantees superior strength. All Tapco elevator bolts are tested for tensile strength, torque, thread conformance and rockwell hardness. All Tapco bolts far exceed IFI specifications.

Tapco also maintains an inventory of nuts & spacers (Hex, square, serrated lock, flange serrated lock, large flange serrated lock and nylon insert lock nuts and polyethylene spacers), and washers (Flat, split ring lock, internal tooth lock, fender, leather, neoprene).

Immediate delivery is available on all stocked items.



Tapco's Western 3-Prong Elevator Bolt.

● For more information please contact:
Randy LeMaster
Tapco Inc.
314/739-9191 · 800/288-2726
www.tapcoinc.com



The RP1200 gripper head from Chronos.

Chronos Robots Grippers pick up just about anything!

Chronos Richardson believes that to achieve the most out of a Robot Palletising Systems end-users need to get a good grip on the business end of the robot. To achieve this Chronos has developed a range of innovative gripper heads, which achieves the optimum output from the world leading Kawasaki Robot Arms. Below is a quick run through of the different types of gripper that we currently offer:

- Pneumatic gripper for cartons and boxes
- Pneumatic gripper for cans, pails, buckets, drums and sheets
- Motorised pusher gripper for bags only
- Motorised pusher gripper for bags and pallet
- Motorised pusher gripper for bags, pallet, and slip sheets
- Pneumatic gripper for bags only
- Pneumatic gripper for bags and pallet
- Pneumatic gripper for bags, pallet, and slip sheets
- Pneumatic pusher gripper for bags
- Multi-pack bundle gripper

Extensive application knowledge and expertise ensure Chronos application engineers can provide you with the best available advice when end-users are planning to install a robot palletiser or perhaps upgrading an existing system. They can discuss your detailed needs and expectations: taking particular account of the site conditions, layout options and your performance expectations.

Our expertise helps ensure the select of the ideal gripper option to take into account the individual circumstance of specific applications, below are some of the typical factors that need to be addressed:

- What palletising outputs are required?
- Are different products being palletised at the same time; or just a single product?
- Do products need to be isolated to take into account reject or under-weight packages?
- What palletising formats are required?
- Which type and size of pallet will be used?

One aspect often overlooked is the optional upstream and downstream requirements including:

- Infeed and accumulation conveyors
- Pallet magazines / slip sheet dispensers
- Protection fences
- Light barriers
- Outfeed conveyors
- Wrapping and load protection systems

Chronos Richardson Limited is a Business Unit of Premier Tech.

● For more information please contact us at:

Tel: 0115 9351351 Email: info@servicechronos.com www.chronosrichardson.com

New products from Kemira

Kemira has launched two new products for the feed industry in Asia Pacific:

1. Kemira Mould Control LP3 NC – a liquid mould inhibitor for feed and grain preservation
2. Kemira Pro GIT SB5 – a solid acidifier for animal performance enhancement

Kemira Mould Control LP3 NC has been specifically developed for market conditions in Southeast Asia. This user-friendly new product is a non-corrosive formula with a higher concentration of propionic acid than most commercially available liquid mould inhibitors. At the same time, an appropriate level of buffering is ensured to make the product non-corrosive to grain silos and feed milling equipment. Besides this new liquid mould inhibitor, Kemira is already well-established as a major supplier of dry mould inhibitors by being the largest producer of calcium propionate in the world and a long term supplier of calcium propionate to feed industries across the Asia Pacific region. Kemira Mould Control SP1 (calcium propionate) is available in all countries through an extensive distribution network.

The feed acidifier Kemira Pro GIT SB5 is a blend of organic acids and salts, with sodium benzoate as its main ingredient.

Sodium benzoate is already widely used in the food industry, but not yet so much in the feed industry due to regulatory constraints. Kemira's new sodium benzoate-based acidifier is more economical and user-friendly than pure benzoic acid-based products. Extensive trials on using Kemira Pro GIT SB5 in pig diets without antibiotics have been conducted in Europe.

● *For more information on locally run trials, please contact Kemira's regional sales office in Singapore or its local agents. For contact details visit www.kemira.com*

65 years of service for Griffin

Whether you manufacture feeds for the pet food industry or aquaculture, the principles for success are the same. First and foremost, always source consistent, high quality ingredients at a fair price from reliable suppliers that offer the highest concentration of digestible nutrition. It's a proven strategy that will ultimately deliver the greatest return on investment.

For over 65 years Griffin Industries has been one of the world's leading rendering companies. Through a commitment to product innovation, quality assurance and market development Griffin manufactures a family of fats and animal proteins that are staples in pet food nutrition and aquaculture throughout the United States and around the world. The foundation to

Griffin's success in producing consistent, high quality products is a commitment to biosecurity and product safety. The cornerstone is the implementation of prevention based programs as defined by the Hazard Analysis Critical Control Points (HACCP) food safety model. A world class centralized laboratory along with satellite labs at each plant location, further validate products will meet and exceed expectations.

In particular, Griffin's feather meal, poultry by-product meal and meat and bone meal ingredients have been identified as tremendous values, especially when compared to the current high prices and volatile supply of fish meal. Extremely stable, high in protein and specifically processed to maximize digestibility, Griffin's proteins translate into cost effective alternatives in both pet food and aquaculture formulations. Through a vast network of production facilities, Griffin is also able to offer flexible solutions from both ruminant and non-ruminant ingredient sources.

Finally, Griffin's team of international logistics professionals can meet the varied needs of customers around the globe ensuring efficient and cost effective shipments.

● *For additional information on Griffin Industries to include product specifications, please check out our website at www.griffinind.com or email dnauman@griffinind.com*



U.S. manufacturer of quality proteins for pet food, aquaculture and animal feeds.
Stop by Griffin's booth at FIAAP Asia 2010.

- 65% Poultry Byproduct Meal, Pet Grade
- Hydrolyzed Feather Meal
- Chicken Meal
- 50% Meat and Bone Meal
- Pork Meal
- Blood Meal



(901) 396-4467 • dnauman@griffinind.com • www.griffinind.com
4221 Alexandria Pike, Cold Spring, KY 41076 USA



Viewpoint Viewpoint Viewpoint Viewpoint Viewpoint View

Southeast Asia's Feed and Grain Markets



Adel Yusupov is the Southeast Asia Regional Director for U.S. Grains Council's market development programs in Southeast Asia. After one year in the position, he shares his thoughts on the region's feed and grain markets with Victam News.

It has been one year since I moved to Kuala Lumpur, Malaysia to manage U.S. Grains Council's market development programs in Southeast Asia. When I started my first days of work in KL office I had no idea of an incredible experience I was about to embark on and a year full of revelations I was about to witness. As a reflect on my first year in Southeast Asia I decided to put my thoughts on a paper and try to illustrate key developments that the region went through, where Southeast Asia stands in relation to feed grain demand and U.S. feed grain exports, its position today and where it is headed in the future.

First, a few words about my region. Southeast Asia includes 10 members of the ASEAN community – Brunei, Burma, Cambodia, Laos, Indonesia, Malaysia, the Philippines, Thailand, Singapore and Vietnam. The ASEAN community is an example of vibrancy and co-existence between region's multi-polar societies. Just to name a few examples – Southeast Asia is home to a military dictatorship (Burma), an absolute monarchy (Brunei), a constitutional monarchy (Thailand), two communist societies (Vietnam and Laos), three "controlled" democracies (Singapore, Malaysia and Cambodia), two "developing" democracies (Philippines and Indonesia). The region's population of 600 m is double of that of the U.S. and its \$1.0 trillion economy is slightly bigger than that of India. Southeast Asia remains one of the world's fastest-growing regions with an average annual economic growth of 5% since 1999, just a bit behind China and India.

Breakneck development

Over the past ten years the region's breakneck development has created many opportunities for investment in livestock and feed sectors. The region's demand for meat skyrocketed due to expanding population and growing per capita income. This prompted rapid flow of investor money, expansion of the livestock sector and transformation of production lines to boost output and satisfy market demand. The roller-coaster year of 2008 brought dramatic changes to the structure of the industry, with highs turning into lows, rich into poor, fast into slow in a blink of a day.

Aggressive fight for the future of corn supply to feed expanding livestock sector in the region during the first half of 2008 was replaced by overstocks of overpriced commodities in traders' warehouses and bearish demand for available and affordable grains in the second half of the year.

While feed demand is down in Europe and the U.S. there has not been much structural or fundamental damage to SEA feed grain demand as result of the global financial crisis. The main reason for this is that Southeast Asian banks have been flush with cash, have had very limited exposure to sub-prime/toxic loans and are generally low on debt. As a result, investment financing of new expansion projects to add capacity in the livestock and feed milling sectors was available for mid-size and large commercial producers and integrated groups. This for the most part helped avoid the repetition of the 1998 Asian Financial Crisis and helped sustain structural feed grain demand.

The crisis and ensuing economic recession acted as market correction mechanism, forcing many back-yard livestock producers and small feed milling companies out of business due to lack of credit and inability to compete with large companies with economies of scale. At the same time, the crisis gave a window of opportunity for integrators such as Thailand's Charoen Pokphand and Betagro, Indonesia's Japfa Comfeed and Wokonoyo, French-Vietnamese Proconco, or American Cargill that managed to increase their feed and livestock production output through mergers and acquisitions and now gearing up for consistent growth. I can only embrace such development as these companies lead the expansion in feed grain demand by encouraging commercial livestock production and vertical integration. These companies constitute a large share of feed grain demand in the region.

There is an on-going change of mindset in Southeast Asian livestock, feed and trading sectors. What used to be small scale, fragmented family feed milling or livestock businesses 20 years ago is now converging into partially or fully integrated commercial businesses. Feed milling and trading companies are becoming more ►



I see continuing growth in Southeast Asia's livestock production and feed demand amid commercialization of livestock farms and integration of feed milling and trading companies

"asset-hungry" and move towards integration of their back-end businesses (grain origination, grain handling infrastructure, grain transportation, ocean fleet) with their front-end businesses (feed milling, crushing, livestock production and marketing). For trading companies, it is no longer a "buy low and sell high" type of business where traders work with many originators and wide range of customers. Trading houses now try to establish long-term relationships built on trust with few but stable/loyal customers.

Increased corn production

Last year's scares about world's food security (encouraged by books like "End of Food", "Global Hunger" and Fuel vs Fuel debate etc) have pushed several countries in SEA to increase their corn production. This was done mostly through government incentives programs (providing fertilizer subsidies, cash-credit and seed supply to corn farmers) and were aided by high world corn prices, which gave farmers more interest in growing corn, rather than other crops. Although Southeast Asia's corn output did increase, I believe the increase is transitory and is an impulsive reaction to the grain price and feed market misbalances of the last two years. Southeast Asia is no Midwest. Arable land is scarce and competition for it is ripe with most pressure coming from the investment-backed biofuels industry and its subordinate palm oil and cassava growing sectors. In agronomic terms, Southeast Asia is an excellent ground to grow rice, but poor ground for corn production due to weather volatility, high humidity and poor infrastructure. Take Philippines for example, which last year

announced plans for reaching corn self-sufficiency but had to import 250,000 mt of corn this year as half of their corn harvest was wiped out by typhoons, torrential rains and ensuing floods. Another anecdotal example is Indonesia where according to flamboyant government reports the country produced 18 MMT of corn in 2008 (USDA's estimate is 7.7 MMT) while total corn demand was 8.5 MMT. I don't know where the remaining 9.5 MMT of corn disappeared, but I do know that somehow Indonesia ended up importing close to 250,000 MT of corn from Myanmar, India, Thailand, and bit from the US and Brazil last year.

So, overall, there is no "structural" damage to feed demand in Southeast Asia as the key drivers of demand – commercial businesses and integrated groups – are in the business and doing quite well. The crisis has resulted in temporary 8% – 10% demand reduction in SEA and the markets are already on the way to recovery and gearing up for growth again. Turn around will be fast and furious.

Growing markets

Of all the Southeast Asian markets, I am very upbeat on Vietnam and growth of its livestock production and feed demand, and potential for U.S. DDGS and U.S. corn exports into the market. Following trend in Thailand, swine production in Vietnam (80% of feed demand) is shifting from smaller traditional farms to larger commercial operations, creating an increased demand for more feed ingredients. The expansion is assisted by governmental support programs, as the Vietnamese government subsidizes interest rates on bank loans to swine producers and exempts swine farmers from taxes on land use and on hog sales. Vietnam's dependence on imported feedstuffs like DDGS (distiller's dried grains with solubles) and corn will increase alongside feed output. Vietnam's local corn production cannot keep pace with demand, creating a shortage of corn at approximately 1.4 to 1.6 million metric tons (55.1 to 63 million bushels) in 2009. Feed demand is robust at the moment and feed millers struggle to satisfy livestock industry needs. Industry estimates that this year's demand will be in 11 – 12 MMT range while total feed production (industrial and home mix) will be 9 MMT. The industry estimates that feed demand will almost double and reach 20 MMT by 2015.

I am also optimistic about Thailand's growing feed demand and DDGS imports. Thailand's export driven, highly sophisticated livestock and feed industries have delivered spectacular results amid last year's political and financial crisis. Last year the market became the largest DDGS importer in SEA despite the highest import tax of 9 percent. There are signs that

Thailand's ability to supply corn to its feed milling sector is drying up as the country had to import corn from neighbouring Cambodia and Burma last year.

Malaysia's feed and livestock industry has reached its maximum and well-saturated. The country is fully dependent on feed grain imports, which equate to about 2.5 MMT per year. U.S. has had to struggle for market share throughout 2008 as supply of Indian corn, priced \$20 – \$25 below U.S. offers flooded the market. Besides promotion of DDGs, the Council's main objective in Malaysia is differentiation of U.S. corn quality against Indian, Thai, Cambodian and Burmese corn supplies, which are notorious for high levels of toxins due to poor post harvest handling. Indonesia, with its 4th largest population base in the world, holds great potential for feed industry. While the market is beset with low consumer purchasing power and sluggish meat demand – key factors behind slowdown in feed demand – it's overall economic situation is improving. The market has had the second best economy growth rate of 4.2 % in SEA in 1stQ of 2009. The feed sector is in overcapacity situation, which lead to further consolidation, mergers and acquisitions, amidst the fall of small producers and expansion of large players, namely – Charoen Pokphand, Japfa Comfeed, Cargill and others.

Optimistic future

The World Bank and IMF economists have been keeping a close eye on Southeast Asia economic performance and so far the region is paring well with the consequences of financial crisis. This highlights my optimism about the long-term potential that South East Asian markets hold in terms of prospects for economic growth and future for healthy feed industry growth. On a macro level, Asia is a land of saving gluts: the flip side to the U.S. and European deficits. The new world order anticipates Asian consumption taking off as some of these savings are spent, which will boost the appreciation of local currencies. Stronger Asian currencies would mean great prospects for imports of U.S. feed grains and co-products.

On micro level, I see continuing growth in Southeast Asia's livestock production and feed demand amid commercialization of livestock farms and integration of feed milling and trading companies. Southeast Asia's growing feed demand and deficiency of local feed grain production, creates a market for 3.8 – 4.0 MMT of corn and 600 TMT of DDGS annually. U.S. has enjoyed a 100% market share in the DDGS markets; however there is more work to be done in differentiating U.S. corn quality and reliability of supply from competing suppliers in order to take over a larger market share in the corn market.



SIX EVENTS

VICTAM
Asia 2010
ANIMAL FEED PETFOOD AQUAFEED

FIAAP
Asia 2010
Feed Ingredients · Additives · Formulation

grapas 2010
asia
● flour milling ● grain ● rice ● pasta processing

VICTAM
International 2011
ANIMAL FEED PETFOOD AQUAFEED

FIAAP
International 2011
Feed Ingredients · Additives · Formulation

grapas 2011
international
● flour milling ● grain ● rice ● pasta processing

ONE AIM

To improve your business!

Visit www.victam.com
for more information

VICTAM International Contact details

For further information on all future VICTAM, FIAAP and GRAPAS events please contact us as shown below or visit our website: www.victam.com

Head Office:
Victam International B.V.
P.O. Box 197
3860 AD Nijkerk
The Netherlands
Tel: +31 33 246 4404
Fax: +31 33 246 4706
Email: expo@victam.com

United Kingdom:
P.O. Box 411
Redhill
RH1 6WE
England
Tel: ++44 (0)1737 763501
Email: andrew.west733@ntlworld.com

Representatives / Consultants

Belgium, France, Spain:
Ir. Theo Dubois
Tel: +32 32 195438
Fax: +32 32 195438
Email: theo.dubois@skynet.be

Germany, Austria, Switzerland:
Mr. Wolfgang Meinert
Tel: +49 54 042 566
Fax: +49 5404 918 641
Email: w.meinert@gmx.net

Italy:
SR Progetti
Tel: +39 02 33614245
Fax: +39 02 38302776
Email: sr-progetti@libero.it

Russia & Baltic States, etc:
Dr. Oksana Titova
Tel: +31 478 691 892
Fax: +31 478 692 793
Email: kamerton@wxs.nl

Ukraine:
Ms. Galyna Andriyko
Tel: +38 056 654 1078
Email: a_galyna@ukr.net

Poland:
Mr. Jacek Orzechowski
Tel: +48 22 398 4557
Fax: +48 22 409 7974
Email: J.orzechowski@mangra.pl

General consultant for Asia:
Mr. Koh Hui Meng
Tel: +65 6402 4302
Email: huiheng_koh@yahoo.com.sg

Thailand:
Mr. Phusit Sasitranondha
Tel: +662 640 8013
Fax: +662 664 2076
Email: phusit@expolink.net

China & Hong Kong, Malaysia:
Ms. Nancy Yung
Talent Asia Services Ltd.
Tel: +852 2591 6386
Fax: +852 2591 6380
Email: TalentA2@netvigator.com

Japan:
Mr. K. Ito
Shiryō Nippou Co., Ltd.
Tel: +81 3 3256 8493
Fax: +81 3 3258 1508

Korea:
Mr. Jung Koo Sang
Millbank Korea Ltd.
Tel: +82 31 434 7545-6
Fax: +82 31 434 7547
Email: millbankkorea@hanmail.net

Taiwan:
Mr. Alex Feng
Shine Favor Enterprise Co. Ltd.
Tel: +886 2 2793 1457
Fax: +886 2 2794 2941
Email: shinefavor@vip.pchome.com.tw



With just a mouse click you can:

- Read the issue page-by-page
- Send a message to any e-mail address in the issue
- Go to any story from the Table of Contents or keyword search
- Check out advertiser Web sites by simply clicking on their links
- Download the magazine to your computer for off-line reading

Get World Grain delivered to you faster and easier than ever...via the internet. A fast and convenient way to read each issue of **WORLD GRAIN**, immediately after it is printed. You can be sure you are getting the latest information from World Grain each and every month!

WORLD-GRAIN.com

Go to world-grain.com to sign up. It's fast and it's free so don't delay!