



Imported Feed Ingredients Why Not?

Today

- Set the scene
- Dispel some myths
- What's important when producing feed?
- Where do we source ingredients from?
- Why do we source where we do?
- Import protocols – their importance
- What would happen if not able to import

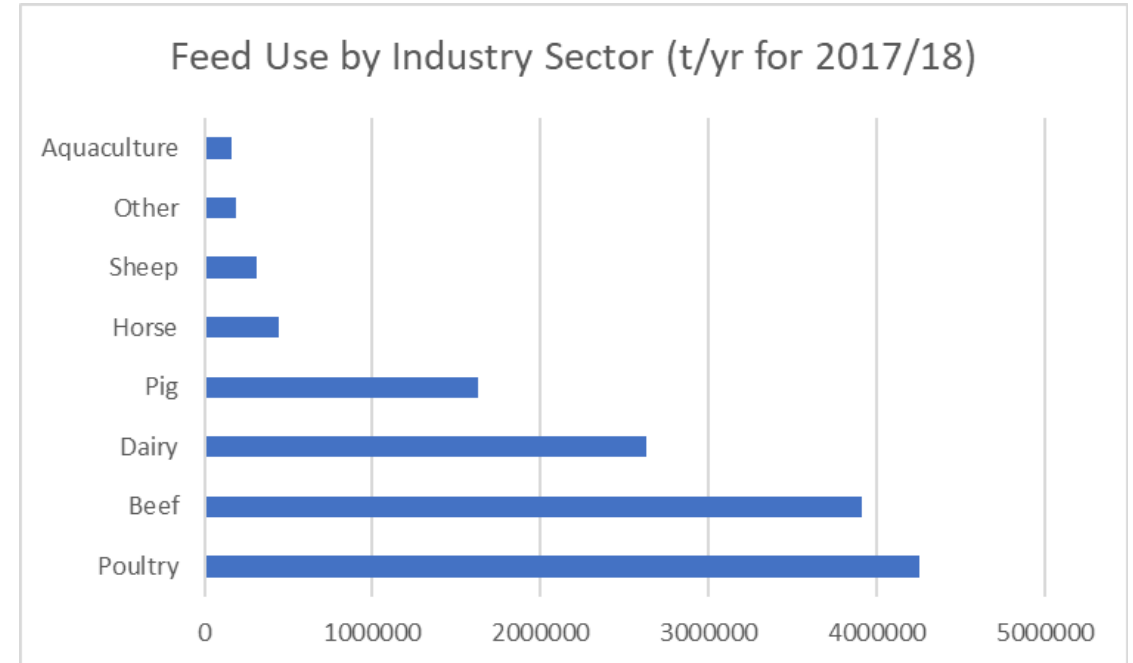


What do we do?

- We produce feed for food
- Members presently feed:
 - Beef 35%
 - Sheep & goats 40%
 - Dairy 60%
 - Pig 85%
 - Aquaculture 85%
 - Poultry 98%
- Year 2050 reach a population of 37.6 million people (55% increase).
- Feed is manufactured on **least cost** basis.
- We operate in a global market.

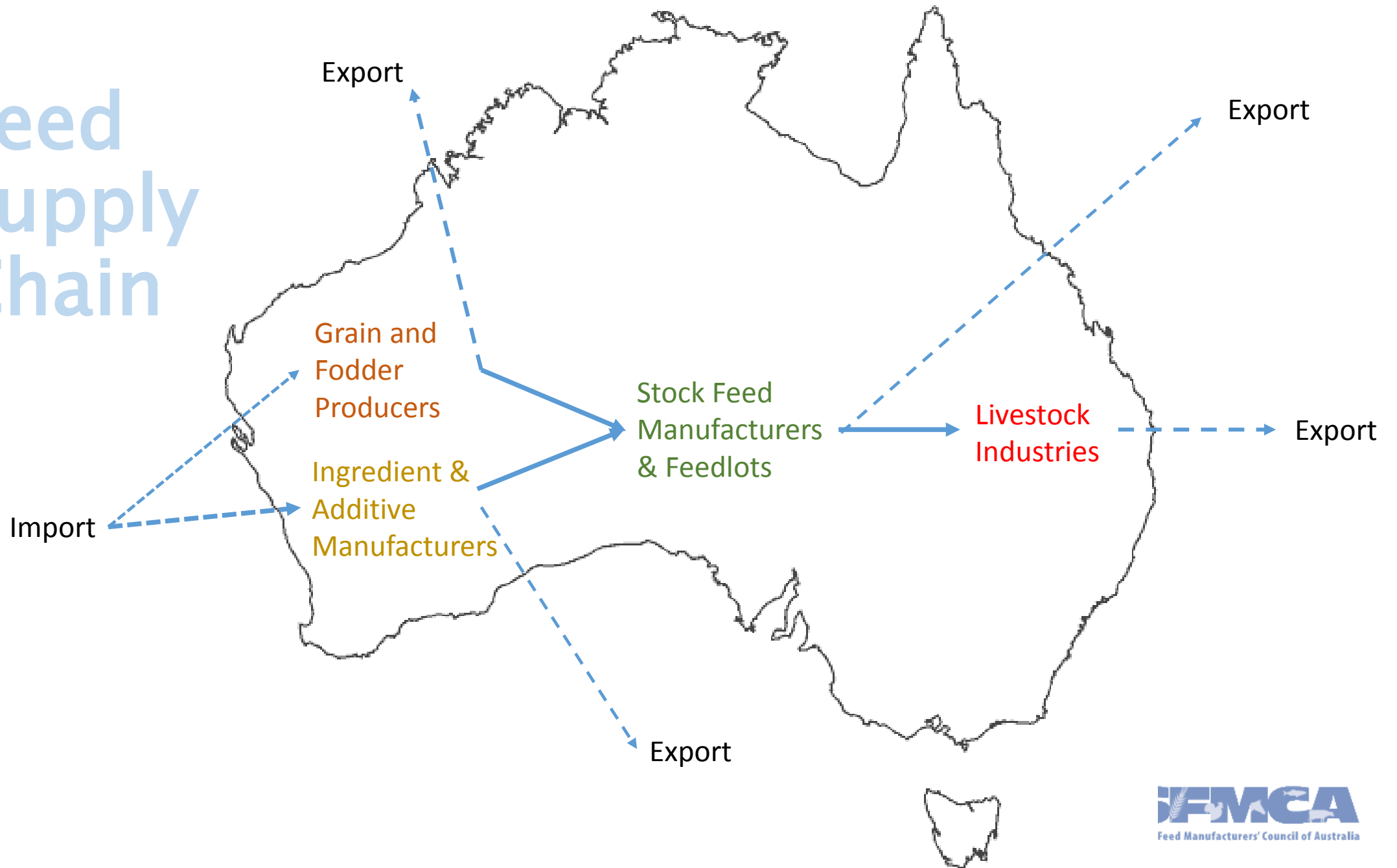
Australian Livestock Market

- Largest domestic market for Australian grain (13.54 mill T).
- Forecast
 - Decline:
 - Dairy
 - Beef
 - Sheep
 - Rise:
 - Poultry
 - Aquaculture
 - Pigs ?



Source: JCS Solutions, 2018

Feed Supply Chain



Important Factors Producing Feed

- Balanced nutritionally for the animal and intended outcome.
- Improves the wellbeing of the animal.
- Consistency of product and supply.
- Safe for the animal & the people consuming it.
- **Least cost.**



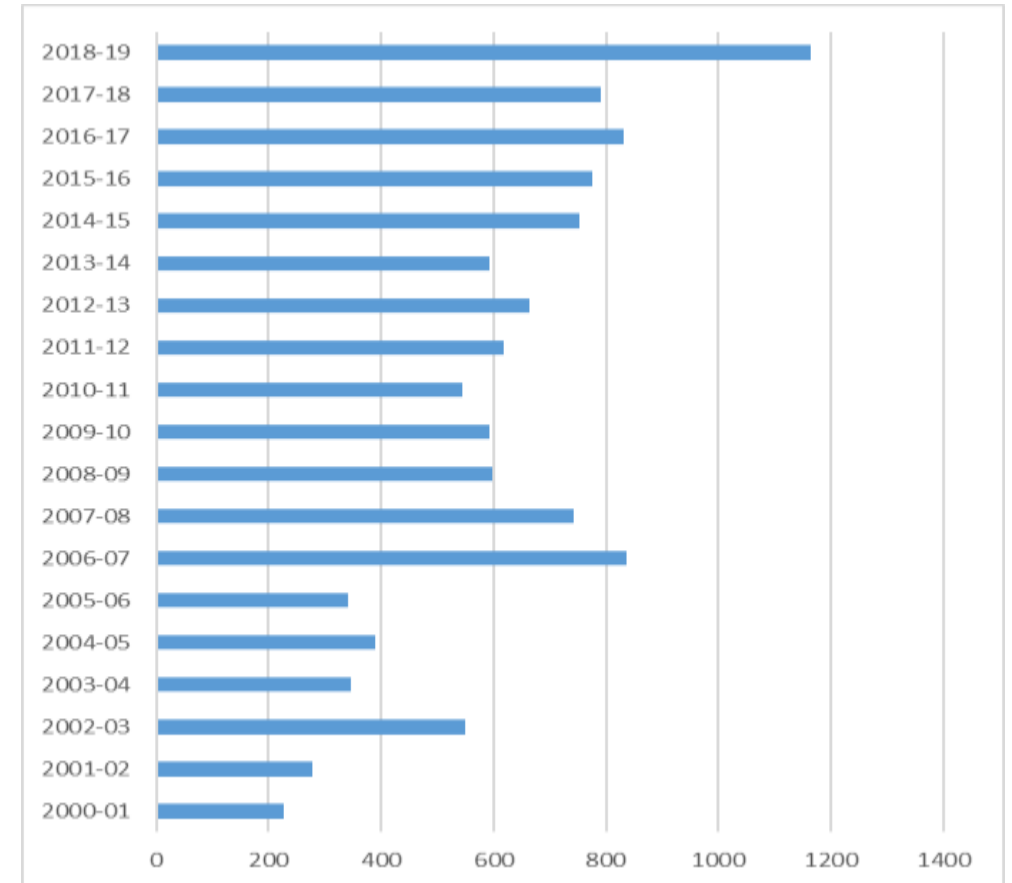
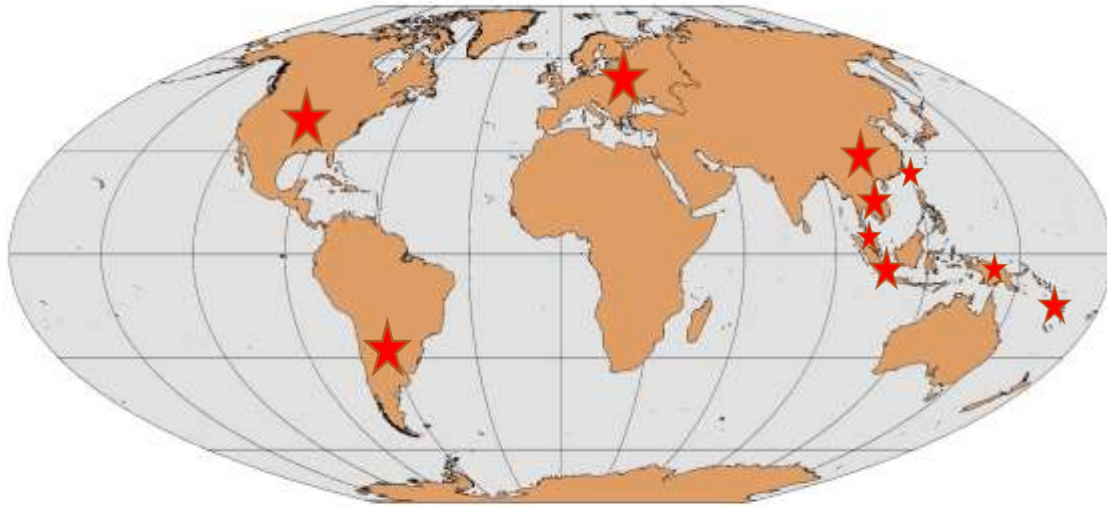
Sourcing Feed Ingredients

- Need to cover certain parameters:
 - Energy (e.g. grains)
 - Protein (e.g. meals)
 - Roughage (e.g. hay)
 - Micro & macro elements (e.g. calcium)
 - Additives (e.g. enzymes, amino acids)
 - Other (e.g. nutraceuticals)



Sourcing Feed Ingredients

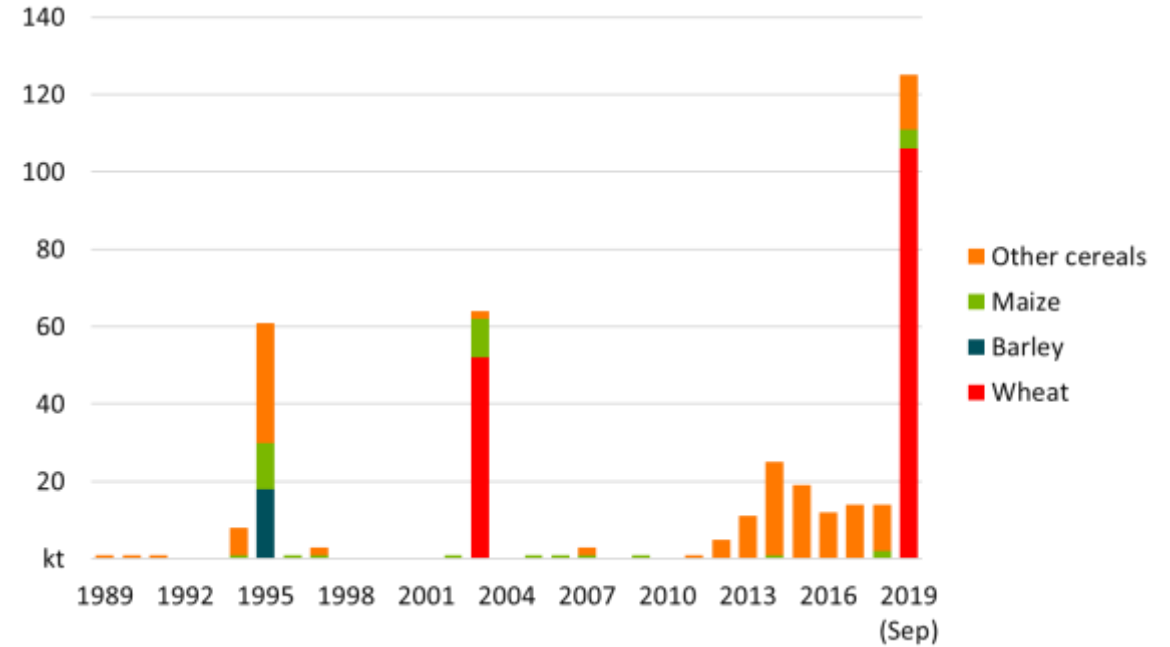
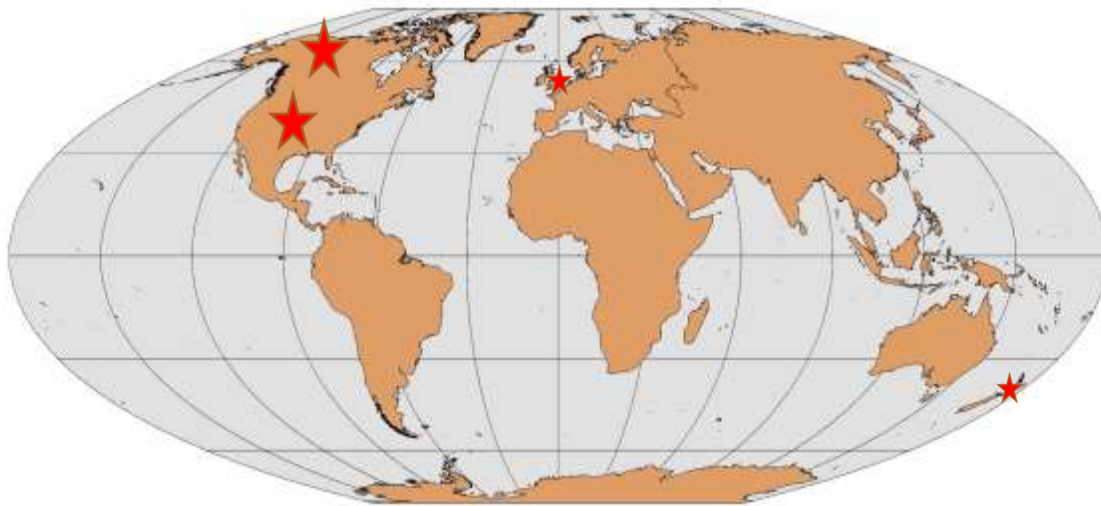
- Protein Meals – SBM & Palm



Source: ABARES, 2020

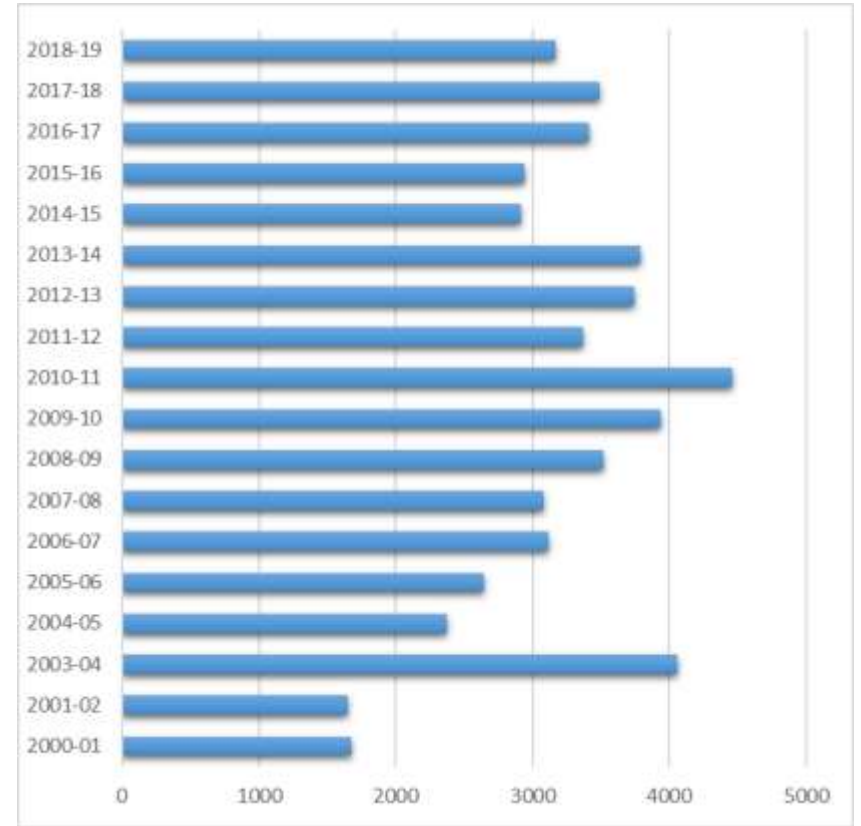
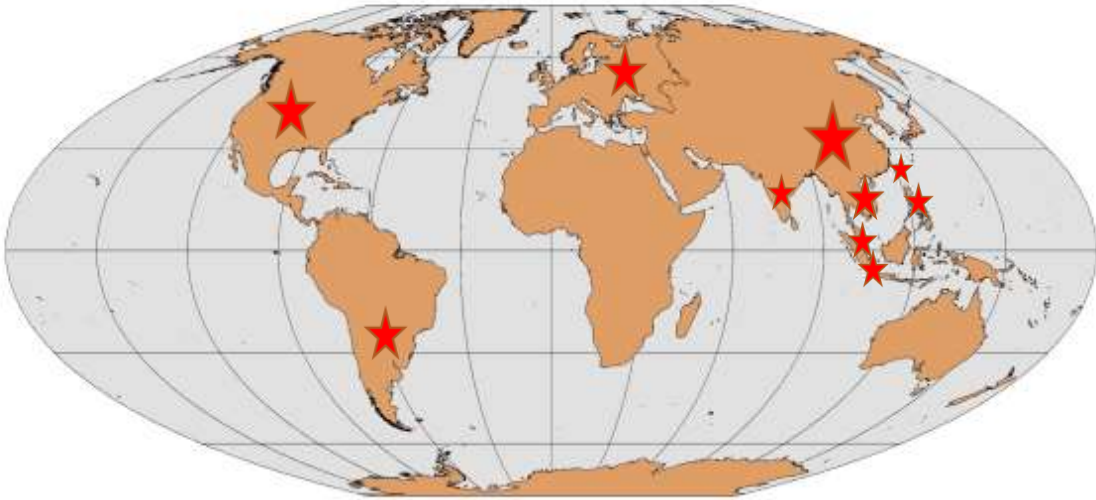
Sourcing Feed Ingredients

- Grains



Sourcing Feed Ingredients

- Additives - enzymes



Why Import?

- Business continuity
- Lack of supply
- Price is lower than domestic
- Consistency of supply
- Consistency of product
- Able to manage the biosecurity risks appropriately

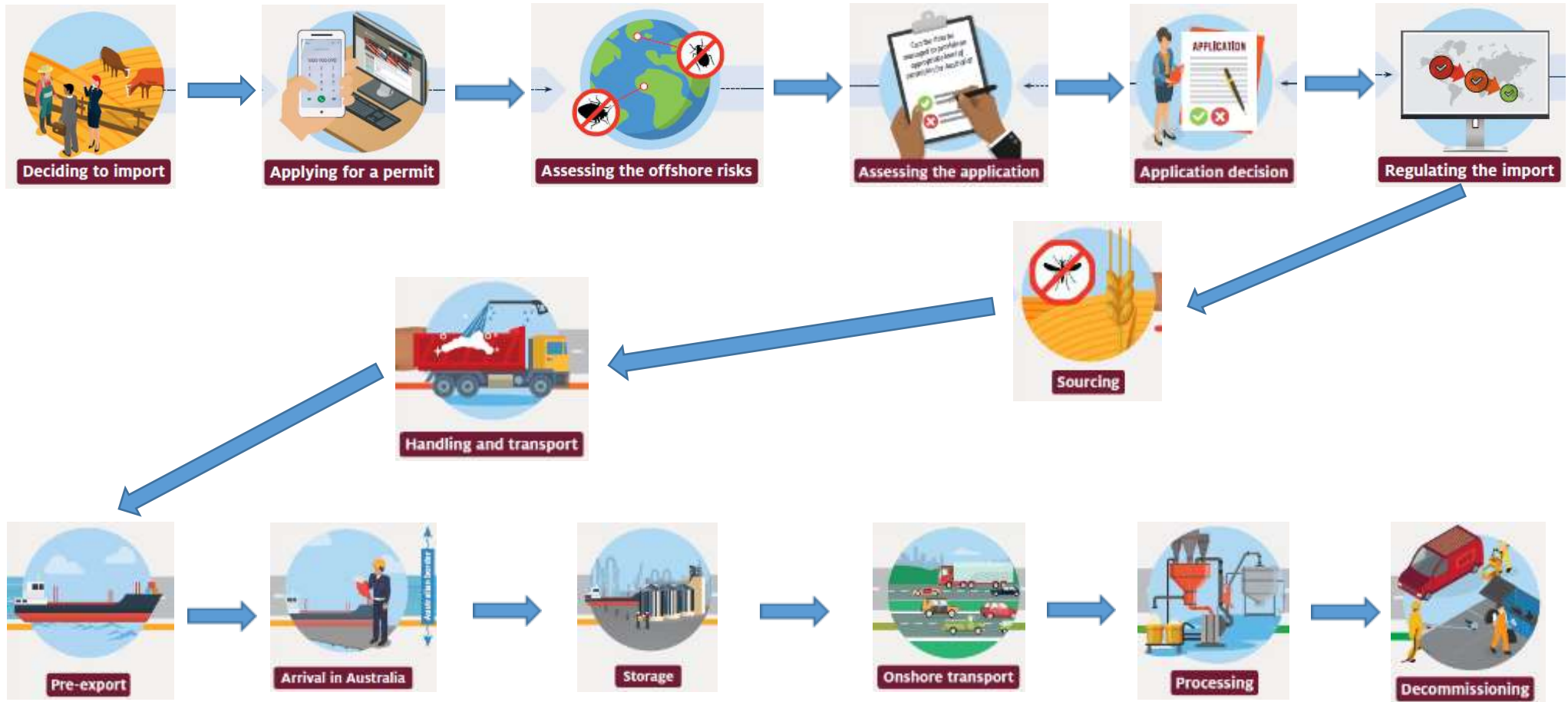


Import Consideration

- Biosecurity
 - Single largest concern when importing products
 - We are responsible for protecting and dealing with breaches
 - Feed manufacturers are an integral part of Australian agriculture
 - Increases cost of supply

- IS IT WORTH THE PAIN?

What Does Importing Entail



Inability to Import Feed Ingredients

- Cost of production would increase
 - Price increases for protein at retail
- Unable to feed livestock during periods of drought
- Wellbeing of livestock would generally suffer
 - Increased use of antimicrobials



Thank you

- Questions

