

NRA President Reports on World Market Survey

J. H. Haugh, President of the National Renderers Association, recently reported the findings of a world-wide market survey jointly sponsored by the NRA and the Foreign Agricultural Service of the USDA. He conducted much of the survey personally, visiting countries around the globe and meeting with governmental representatives, industry officials, and potential customers for products of the American rendering industry. Purpose of the survey was to determine which countries offer the best potential for NRA market development activities, with more than 50% of our domestic production being shipped abroad. Highlights of the report, country by country, are as follows:

THE PHILIPPINES. There is a good potential here for increased consumption of both tallow and protein meal, even in the face of competing with Australia. Even though the U.S. enjoys a tariff advantage over other countries of 5% on tallow and 2.5% on meat meal, much lower freight costs put Australian products at a decided advantage.

The use of fats in feeds offers a promising future since broiler and swine production is rising fast. During Mr. Haugh's visit, he arranged for the donation of tallow to the University of the Philippine Islands for the use in their broiler research activities.

FREE CHINA. There is a definite opportunity in this country for greater imports of low cost fats for addition to feed as the feed industry progresses. This is expected at an early date because the government plans to reduce duties on feed grains, which should give great impetus to the feed industry.

THAILAND. Broad scale opportunities for market expansion are found in Thailand, but will probably require considerable time to develop. Sales of the soap industry are expected to rise, despite increasing competition from de-

tergents. Since Thailand is importing coconut oil for soap production, tallow is now competing with a native product and maintains a good position if soap production is to increase.

The use of fats in feeds offers less immediate promise because of the general lack of knowledge which handicaps the rapid development of a good broiler industry. A good potential exists, however, and our assistance with poultry research activities was offered to Kasetsart University, the major agricultural college.

INDIA. Poultry production is at a very low level, but the point now seems to have been reached where rapid advances can change the entire picture, mainly because ample supplies of American high-efficiency chicks will soon be made available for Indian purchase.

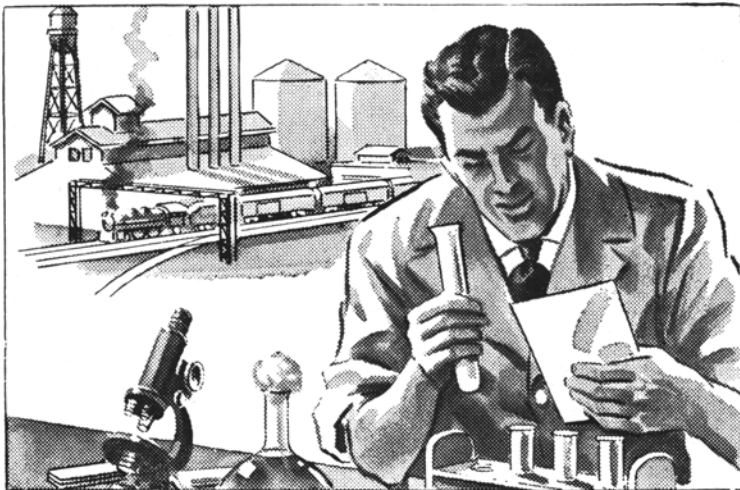
A technical consultant would be of great value in accelerating the development of both the broiler and the soap industries. Both are handicapped to some extent, however, by the peculiarities of Indian finance. In the soap industry, for example, the government restricts the supply and price of raw materials and controls the price of the finished product. The State Trading Corp. makes a large profit on imported materials such as copra and palm oil, with the result that raw materials are costing soap manufacturers about 45% more than if they went into the Free World Market to buy them.

The soap industry would welcome America tallow under PL 480 if the details can be worked out through their government.

PAKISTAN. Present shipments of U.S. tallow to Pakistan are holding the soap industry together and have helped to increase soap production considerably in the last three years. They can use even more tallow if an equitable basis for trading can be arranged.

Small strides have been taken in the poultry industry but the potential is great. All that is needed is technical skill and the right breeding stock. These barriers should be only temporary at best.

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EGYPT. There is no question that Egypt could use more tallow, along with a variety of fatty acids. Soap production is only 50% of capacity and would increase automatically if they had more raw material. The Ministry of Supply estimates that they can use 50% more tallow than they currently import, but face the problem of hard currency. It was suggested that if we would allow 12 months rather than six-month credit, tallow imports could be increased 20,000 tons/year.

Feed industry potential is good. The government has a plan which is geared for production of 20,000 broilers a day, which would require the import of at least 35,000 tons conen.

TURKEY. The Turkish soap industry has converted to tallow in the last year and a half, finding that it makes good economic sense to free larger amounts of their olive oil for export. They are badly in need of technical assistance, however, to help the soap manufacturers take full advantage of tallow's potential. (Following Mr. Haugh's visit, Juan Amiehgali, NRA's European Technical Consultant, and a Spanish soap expert spent two weeks in Turkey for this purpose.)

ISRAEL. Both the feed and soap industries have expressed an interest in continuing their initial use of tallow. For example, a representative of one of the leading feed organizations recently returned from a visit to the U.S. convinced of the real value of tallow and plans to start adding it to his feed. Its regular use should soon be well established in this industry.

Economics create some problems in that vegetable oil foots can be imported for considerably less than tallow. The users recognize the extra value of tallow, but there is a limit to how much more they will pay for it. Much of our future here will depend upon the price-establishing variations of supply and demand, along with the interest of the Israeli government in using its PL 480 allocation of tallow.

GREECE. The Greeks have traditionally used by-products from the production of olive oil for soap manufacture. Until these products are upgraded and move into other channels, there does not appear to be much prospect of significant tallow imports for soap manufacture. Technical advice, along with some U.S. know-how and investment, could change this picture, but it is doubtful that the Greeks will do it themselves.

ITALY. A revolution in agricultural feeding is taking place in this country and prospects for increased usage of products such as ours are excellent. For example, Italy is importing thousands of calves and is using large amounts of milk replacers to feed them. Competition between ani-



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