

# SOYA UPDATE

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## Analyst: Outlook promising for US soybean oil buyers

Barring unexpectedly heavy Chinese purchases of US soybeans or a weather threat to the 2020 soybean crop, food industry ingredient buyers may expect to see relatively low, which is to say favorable, soybean oil prices continuing into the fall, Paul Meyers, vice president, commodity analysis, Foresight Commodity Services, Inc., told executives participating in the Sosland Publishing Purchasing Seminar webinar on June 1.

Meyers pointed out that soybean and soybean oil prices already were low. Amid ample US and world supplies, the average soybean futures level in April was near the lowest seen in 12 years. Soybean oil futures in April averaged about 26¢ a pound, Meyers said. The last time April prices were so low was 14 years ago, he added. Meyers said for the ingredient buyer, soybean oil futures at 25¢ to 27¢ a pound is a very good value, even if futures move lower in the next couple of months.

Meyers said he expected US soybean production in 2020 to rebound to about 4.14 billion bushels compared with 3.557 billion bushels in 2019, assuming normal weather. He pointed out South America was harvesting a record crop this year and may harvest yet another record crop in 2020-21. Supplies will remain plentiful worldwide even if not at a record level in the United States.

### Note from Publisher -

- Soya Update monthly magazine is posted to our subscribers by the 10 th of every month invariably and in case it is not delivered within a week, we may please be informed about its non-delivery.
- We welcome articles, success stories and other allied information from our readers and patrons, concerning soya products and other allied matters.

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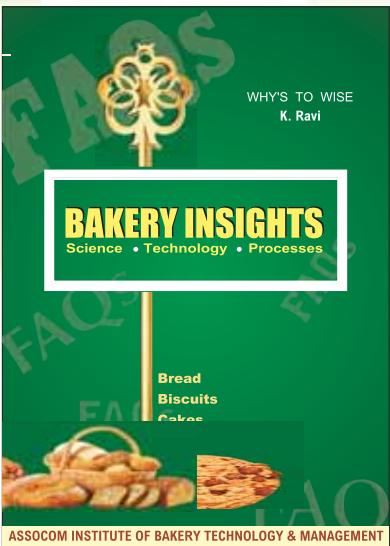
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Meyers said he expected US soybean exports in 2020-21 to total about 1.95 billion bushels compared with his forecast of 1.625 billion bushels in the current year. Much hinged on how much US soybeans China will buy. Meyers said assuming no further breakdown in trade relations, he thought China may buy 23 million to 24 million tonnes of US soybeans in 2020-21 compared to perhaps 15 million tonnes in 2019-20 but far below the 45 million tonnes in the US-China phase one agreement.

Meyers projected the US carryover of soybeans on Sept. 1, 2021, at around 546 million bushels compared with his forecast for the current year at 621 million bushels.

Soybean oil supplies in 2020-21 should be around 27.335 billion pounds, Meyers said, compared with his forecast for the current year at about 26.745 billion pounds.

Steadily increasing use of soybean oil for biodiesel manufacture in recent years has helped underpin soybean oil prices. Despite a slow couple of months because of the coronavirus pandemic reducing the number of miles driven, Meyers pointed out biodiesel production was on the rise again. He forecast soybean oil use for biodiesel

manufacture in 2020-21 at about 8 billion pounds in 2020-21 compared with 7.5 billion pounds in 2019-20 and 7.863 billion pounds in 2018-19.

He forecast the soybean oil carryover on Oct. 1, 2021, at 2.135 billion pounds, up from his forecast for 2020 at 1.995 billion pounds.

Bottom line, soybean and soybean oil supplies should be larger in the coming year compared with 2019-20, and prices should remain under pressure.

Meyers forecast nearby soybean futures to average between \$8.35 and \$8.50 a bushel in the second quarter of 2020 compared with \$8.93 as the January-March average. Nearby futures should average between \$8.10 and \$8.50 a bushel in July-September and between \$8 and \$8.40 in October-December.

Meyers forecast nearby soybean oil futures to average between 25.8¢ and 27.3¢ a pound in the second quarter of 2020 compared with 30.1¢ as the average for January-March. Nearby soybean oil futures should average between 25¢ and 26.5¢ a pound in July-September, and between 24.7¢ and 26.2¢ in October-December.

## South Africa's aquafeed output rising

The South Africa aquaculture sector's contribution to the economy is considered minor, but the overall growth of fish farming in the country has been described by its Department of Agriculture as "fast-developing," raising the expectations of increased demand for aquafeed and associated ingredients, particularly corn, fishmeal, soybeans, fish oil and even wheat.

A growing global awareness of the benefits of consuming seafood has seen South Africa channeling a large share of its estimated 612,200 tonnes of capture fish to international markets, thus creating gaps in domestic supply chains. A revamped aquaculture sector is expected to fill and ultimately push up the country's per capita fish consumption from the current 6.1 kilograms, which is far below Africa's average of 8.9 kilograms and the global figure of 20.3 kilograms.

South Africa has identified the aquaculture sector's potential to support economic growth and



had previously identified at least 24 different projects to be implemented under the country's development blueprint of "Operation Phakisa: Ocean economy," with a target of increasing output an estimated 5,500 tonnes – of which 3,660 tonnes are marine aquaculture in 2017 – to 20,000 tonnes by 2030.

The envisaged projects, a few of which are underway, are located mainly in aquaculture production areas of Limpopo, Mpumalanga, Lowveld and northern KwaZulu Natal.

Earlier, South Africa had set a short-term target of increasing the sector's revenue to \$78 million from \$27 million by the end of 2019. But because of the sluggish performance of the economy that slowed from 1.3% in 2017 to 0.7% in 2018, this may not have been achieved. Statistics on the 2019 aquaculture production levels and revenue earnings are yet to be released.

Currently, South Africa's aquaculture sector, which contributes less than 1% to the country's gross domestic product, produces aquatic plants, shellfish and fresh fish products despite persisting constraints in supply of freshwater that hampers the freshwater fish farming.

For the marine aquaculture segment, production is focused on abalone, black mussel, oyster, prawn, finfish and seaweed. The seaweed production contributes nearly one-third of South Africa's total aquaculture production.

In fact, the country's share in the global farmed abalone market is more than 20%, according to the Food and Agriculture Organization (FAO), which adds: "With the introduction of finfish culture, marine aquaculture production is expected to increase substantially."

Freshwater aquaculture in South Africa is limited to the production of trout or salmon in the Western Cape and highlands areas, with small scale production of catfish, freshwater crayfish, tilapia and clarias gariepinus with a total output of less than 1,500 tonnes.

### Drought impacts key raw materials

South Africa is not known to import compound animal feed but is a major African producer of corn and soybeans, the two main raw materials in the manufacture of aquafeed to meet the demand of the country's nascent aquaculture sector. For example, during 2018-19, an estimated 10.4 million to 10.7 million tonnes of corn and about 1.6 million tonnes of soybeans were harvested.

However, production of these two key aquafeed raw materials frequently has been affected by droughts that the Animal Feed Manufacturers of South Africa (AFMA), a private organization representing animal feed producers in the country, said impacts production of the grains, sometimes leading to a "decline in the country's production with a massive negative impact on the crop and for end users and processors."

The Department of Agriculture said "raw materials for animal feed to some extent are adequately available in South Africa, particularly maize, the major ingredient in many of the manufacture of animal feeds."

According to the AFMA, "the inclusion rate for maize was 52.05% of total feed sales on average." Elsewhere, the association estimates the inclusion rates for soybean meal, sunflower seed and oilcake at 13.43% and 4.57%, respectively.

In addition, the highly priced and high-quality protein animal feed ingredient of fishmeal is produced in South Africa and largely used in the formulation of compound feed, although the country remains a net exporter of the product, according to the Department of Agriculture.

A 2018 report by the Department titled, "South African Animal Feeds Market Analysis," said currently there is a limited amount of fishmeal used in the compound feed formulation. The inclusion rate of fishmeal in feed production is estimated at 0.39%.

"Future expansion possibilities of fishmeal production are limited (in South Africa)," the report said. "The high international demand for fishmeal over the years led to a tendency to export rather than supplying the local market."

An estimated 55,000 tonnes of fishmeal was exported from South Africa in 2016-17 despite campaigns by environmentalists such as Greenpeace against what it calls "wasteful fishmeal and fish oil industry, which is taking fish from people's plates to feed fish farms, pigs or poultry in faraway markets."

### Competing for feed ingredients

The number and size of fish farms in South Africa are increasing.



Elsewhere, aquaculture's demand for quality feed produced from processing of soybeans, corn and fishmeal, is in competition with the increasing requirements of the same ingredients for the production of beef, poultry and pork, both for South Africa's export market and also for local consumption. The increase in demand for meat, eggs and milk in South Africa, driven largely by the increasing population now at 57 million, along with the government's push for an expansion of aquaculture sector could lead to an increase in aquafeed prices. This is in response to a spike in cost of the ingredients used in the formulation of animal feed.

For example, the Aquaculture Association of Southern Africa (AASA) said production of trout, which is mainly centered in the high mountain Lydenburg area, Western Cape and Kwazulu Natal, has been on the decline largely because of "economies of scale and higher feed costs."

Aquaculture farms operating a recirculating aquaculture system (RAS) spend between 40% and 60% of their entire operational costs on feeds. Furthermore, specialized aquafeed producing companies buying the raw materials, such as corn and soybeans, could be few since the South African market is still considered small compared to others like Egypt. For example, Marifeed, a specialized aquafeed producer, said the company currently "formulates feeds for every life stage of abalone" in South Africa. The company manufactures the ABFEED brand of aquafeed in pellet form.

RCL Foods' affiliate, Epol, also supplies the South Africa aquafeed market with its farmix trout (concentrate) and trout pellets formulations. Furthermore, companies such as Yara Animal Nutrition South Africa, an affiliate of Yara International, produces Kynofos 18 Grandé, which the company describes as a "versatile P-supplement for all types of feeds and is recommended for use in concentrate, compound feeds, mineral feeds and free-choice supplements for ruminants, monogastric animals and aquatic species." Elsewhere, Specialized Aquatic Feeds company currently produces aquafeed to meet specific nutritional, immunity and growth needs of abalone, catfish, cob, tilapia, trout and yellowtail. Notably, there are more than 74 other companies, all affiliated to the AFMA as associate members, that supply aquafeed production

equipment, premix feed additives and key feed ingredients to support fish farming in South Africa.

In addition, there are other animal feed manufacturers, some that are members of the AFMA, producing aquafeed alongside many more brands of animal feed to meet the increasing demand from domestic and wild animals while at a smaller level there are feedlots, smaller feed mills and home mixers to supplement mainstream feed producers. The outlook of South Africa's aquafeed market will depend on how the government needs to address the constraints hampering expansion of the aquaculture sector such as the high cost of production, lack of access to funding, especially for small and medium investors, inadequate skilled manpower to support modern aquaculture production systems, and poor access to both the domestic and regional markets.

The aquafeed market also faces the challenge of access to feedstock such as corn and soybeans, particularly during the prolonged dry season that South Africa experiences frequently, and its high cost because of the volatility of global oil prices and competing demand for same products for human consumption. It is envisaged that under the "Operation Phakisa: Ocean economy" initiative, South Africa would address the challenges holding back growth of the aquaculture sector and therefore constraining increased uptake of quality aquafeed. The ambitious government initiative would in the long term unlock the economic potential of South Africa's oceans and generate up to \$9 billion annually for the economy.

Specifically, the 24 planned marine aquaculture sector projects "offer significant potential for rural development, especially for marginalized coastal communities," according to the Department of Agriculture. But for the envisaged exponential growth of aquafeed manufacturing to develop in South Africa, the country's Agricultural Sector Education and Training Authority (AGRISETA) said the government must give priority to the development of the aquaculture sector, which it said "has enormous potential to develop and expand – not only large commercial enterprises, but also with regards to small-scale and co-operative farmers."

# USDA: Record corn crop, larger soybean supplies on tap for 2020-21

The US Department of Agriculture on May 12 said the outlook for corn in 2020-21 was for record high production and domestic use, greater exports and larger ending stocks than forecast for the current year. The soybean outlook for 2020-21 outlook was for larger supplies and higher crush and exports, but smaller ending stocks compared with 2019-20.

The USDA forecast the carryover of corn on Sept. 1, 2021, at 3.318 billion bushels, up 1.22 billion bushels, or 58%, from 2.098 billion bushels as the projection for the current year. The 2021 corn carryover as forecast would be the largest since 4.259 billion bushels in 1988.

The 2020 corn crop was projected at a record 15.995 billion bushels, up 2.332 billion bushels, or 17%, from 13.663 billion bushels in 2019. The production forecast was based on a projected harvested area at 89.6 million acres (based on a planted area forecast at 97 million acres in the Prospective Plantings report issued at the end of March and historical abandonment) and a weather-adjusted trendline yield at 178.5 bushels per acre.

The total corn supply in 2020-21 was forecast at a record 18.118 billion bushels, up 2.190 billion bushels, or 14%, from 15.928 billion bushels in 2019-20.

The USDA projected domestic use of corn in 2020-21 at a record 12.650 billion bushels, up 595 million bushels, or 5%, from a forecast 12.055 billion bushels in 2019-20. Feed and residual use of corn in 2020-21 was forecast at 6.05 billion bushels, up 350 million bushels from a projected 5.7 billion bushels in the current year.

Food, seed and industrial use of corn in 2020-21 was projected at 6.6 billion bushels, up 245 million bushels, or 4%, from 6.355 billion bushels as the 2019-20 forecast. Of that total, corn use for ethanol in 2020-21 was projected at 5.2 billion bushels, up 250 million bushels from the downwardly revised (by 100 million bushels) 4.95 billion bushels as the 2019-20 forecast.



The USDA commented, "Corn used for ethanol is projected to increase from the 2019-20 COVID-19-reduced levels, based on expectations for a rebound in US motor gasoline consumption."

The USDA projected corn exports in 2020-21 at 2.15 billion bushels, up 375 million bushels, or 21%, from the forecast 1.775 billion bushels in the current year. The USDA said, "US market share is expected to increase from the 2019-20 multi-year low but remains below the average level seen during 2015-16 to 2019-20 with expected competition from Argentina, Brazil and Ukraine."

The USDA projected the 2020-21 US corn stocks-to-use ratio at 22.4%, the highest since 1992-93.

"With larger stocks relative to use, the season average farm price is projected at \$3.20 per bushel, down 40¢ from 2019-20 and the lowest since 2006-07," the USDA said.

The USDA projected the carryover of soybeans on Sept. 1, 2021, at 405 million bushels, down 175 million bushels, or 30%, from 580 million bushels as forecast for 2019-20. As forecast, the 2021 carryover would be the smallest since 302 million bushels in 2017.

The USDA forecast the 2020 soybean crop at 4.125 billion bushels, up 568 million bushels, or 16%, from 3.557 billion bushels in 2019 and compared with 4.428 billion bushels in 2018.

The 2020-21 soybean supply was forecast at 4.72 billion bushels, up 239 million bushels, or 5%, from 4.481 billion bushels in 2019-20 and compared with 4.88 billion bushels in 2018-19.

The USDA forecast the soybean crush in 2020-21 at 2.13 billion bushels, up 5 million bushels from the projection for the current year.

Soybean exports in 2020-21 were projected at 2.05 billion bushels, up 375 million bushels, or 22%, from a forecast 1.675 billion bushels in 2019-20. It should be noted the forecast for 2019-20 exports was lowered 100 million bushels from the April outlook. Total soybean disappearance in 2020-21 was projected at 4.315 billion bushels,

up 414 million bushels, or 11%, from 3.901 billion bushels as forecast for 2019-20.

The USDA forecast the average farm price of soybeans in 2020-21 at \$8.20 a bushel, down 30¢ from the projection for the current year at \$8.50 a bushel.

## Ready to Eat Foods and COVID-19 (Safety, Nutrition & Taste)

**Ready to Eat Foods and COVID-19 (Safety, Nutrition & Taste)**

**Scheme designed to better the nutritional standing of school-age children nationwide**

**Mid-day Meal Scheme – Current Challenges & Future Plans under Nutritive Food for Masses**

MR. SATYABRAT PADHI  
GOVERNMENT RELATIONS & FOOD FORTIFICATION  
THE AKSHAYA PATRA FOUNDATION

**Mid Day Meal Scheme AT A GLANCE**

- The scheme supplies free lunches on working days for children in primary and upper primary classes in government, government aided
- Mid-day meal launched in 1995 with effected from 2001 and the first guideline issued by MHRD in 2006
- Target group is between 6 to 14 years (in few states the age group has been extended to 16 & 18 years)
- 11.59 Crore children are enrolled under MDM scheme
- 25.95 Lakh cook-cum-helpers have been engaged to provide MDM to school children
- 8.45 Lakh kitchen-cum-stores have been constructed to ensure safety of food grains and ensure hygiene meals to the children
- Aim: The scheme is designed to retain the children at school level by providing a free healthy nutritious noon meal. Alleviation of classroom hunger is also aimed at improving academic achievement in undernourished children.

**Mid Day Meal Scheme**

**2 ZERO HUNGER**

**4 QUALITY EDUCATION**

MDMS in Resonance with SDGs

- MDM endeavours to resolve Sustainable Development Goals spearheaded by the United Nations.
- MHRD addresses these two crucial challenges of hunger and education for school children in India.

**Mid Day Meal Scheme**

* Food norms		Quantity per day/Child	
S. No.	Items	Primary	Upper Primary
1	Food grains	100 gms	150 gms
2	Pulses	20 gms	30 gms
3	Vegetables (leafy also)	50 gms	75 gms
4	Oil & fat	5 gms	7.5 gms
5	Salt & condiments	As per need	As per need

Revised Cooking cost per child per school day w.e.f. 01.04.2019

Stage	Total Cost	Central-State Sharing		Non-NER States and UTs with Legislature(60:40)		NER-States (90:10) and 3 Himalayan States		UTs without Legislature (10%)
		Central	State	Central	State			
Primary	Rs.4.48	Rs.2.69	Rs.1.79	Rs.4.03	Rs.0.45	Rs.4.48		
Upper Primary	Rs. 6.71	Rs. 4.03	Rs. 2.68	Rs. 6.04	Rs. 0.67	Rs. 6.71		

**Mid Day Meal Scheme**

**EDUCATION AND FOOD SECURITIES LINKAGES:**

- Right to Education Act: 1<sup>st</sup> April, 2010
- Right to Food Act: 12<sup>th</sup> September, 2013

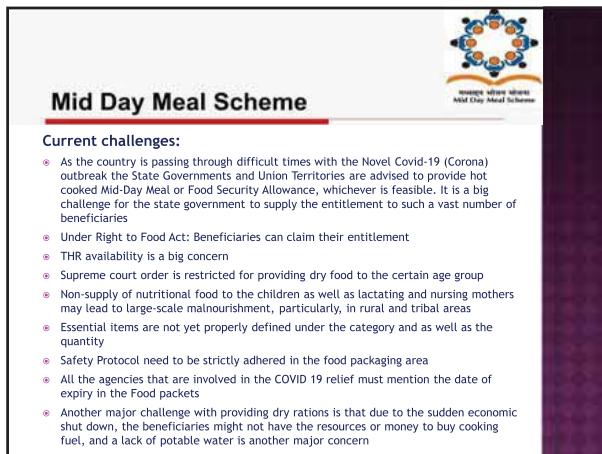
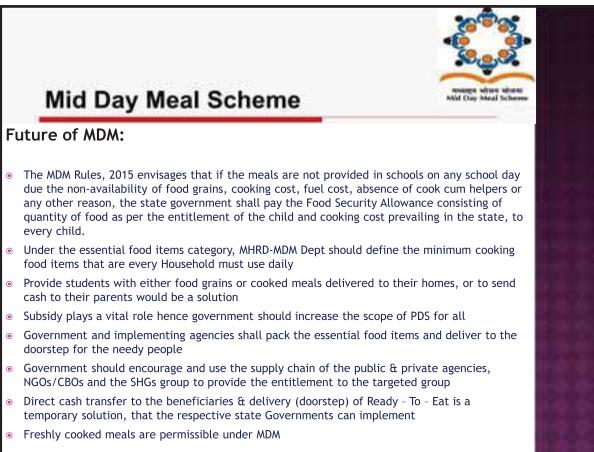
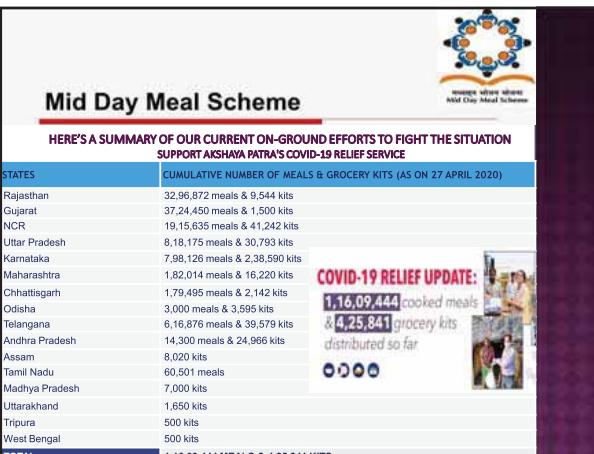
**HOW CENTRALIZED KITCHEN PLAYS A VITAL ROLE:**

- There are over 400+ NGOs and Trusts that are currently serving mid-day meals in Government schools across India either through centralized or decentralized kitchens
- Centralized kitchen system ensures that process is transparent, and utilization of grain is 100%
- Actual meal cost is more than the subsidy as the cost of operation in centralized kitchens is higher than the decentralized kitchen

**Mid Day Meal Scheme**

**THE AKSHAYA PATRA FOUNDATION: AT A GLANCE**

- The Akshaya Patra Foundation is an NGO in India headquartered in Bengaluru. We strives to eliminate classroom hunger by implementing the Mid-Day Meal Scheme in the government schools and government-aided schools.
- Since 2000, Akshaya Patra has been concerting all its efforts towards providing fresh and nutritious meals to children on every single school day.
- Our partnership with the Government of India and various State Governments, along with the persistent support from corporates, individual donors, and well-wishers have helped us to grow from serving just 1,500 children in 5 schools in 2000 to serving 1.8 million children.
- Today, Akshaya Patra is the world's largest (not-for-profit run) Mid-Day Meal Programme with over 52 kitchens serving wholesome food every school day to over 1.8 million children from 19,039 schools across 12 states & 2 Union territories of India.



## FAO: Agri-food sector resilient in face of COVID-19

While food markets will face uncertainty in coming months because of the coronavirus (COVID-19) pandemic, the agri-food sector is likely to show more resilience than other sectors, according to a new report from the Food and Agriculture Organization (FAO).

"The impacts of the COVID-19 pandemic have been felt — at varying degrees — across all food sectors assessed by FAO," said Boubaker Ben-Belhassen, director of the FAO Trade and Markets Division. "Whilst COVID-19 has posed a serious threat to food security, overall, our analysis shows that from the global perspective, agricultural commodity markets are proving to be more resilient to the pandemic than many other sectors. That said, owing to the size of the challenge and the enormous uncertainties associated with it, the international community must remain vigilant and ready to react, if and when necessary."



The FAO's Food Outlook report forecasts production and market trends in 2020-21 for the world's most traded food commodities — cereals, oil crops, meat, dairy, fish and sugar.

In spite of uncertainties posed by the pandemic, the FAO's first forecasts for the 2020-21 season point to a comfortable cereal supply and demand situation. Early prospects suggest global cereal production in 2020 surpassing the previous year's record by 2.6%.

World cereal trade in 2020-21 is projected to stand at 433 million tonnes, up 2.2% (9.4 million tonnes) from 2019-20, and setting a new record high, boosted by expected expansions in trade of all major cereals.

Despite subdued demand prospects linked, among other things, to the pandemic, the FAO's latest 2019-20 forecasts for oilseeds and derived products point toward a tightening global supply-demand situation, triggered by a marked contraction in production.

Tentative forecasts for 2020-21 suggest that supplies could remain tight relative to demand.

The report has a special article that compares the current COVID-19 health crisis with the 2007-09 crises, identifying differences and commonalities across countries and food commodities, and examining the current and likely impacts of the pandemic, with a focus on international food markets.

It also provides an informative benchmark on how to return market functioning to normality, even if contagion rates remain unchecked.

The feature concludes that compared to the 2007-08 global food price crisis, the world is faring better now as global food production prospects are positive, stocks are high, international food prices are low and trade is broader-based with more importing and exporting countries. Furthermore, policymakers are now more experienced in dealing with global crises, as well as better informed and prepared.

However, although, globally, there is enough food for everyone, the significant decline in economic growth due to the pandemic has translated into an issue of access to food, limiting people's ability to get enough or nutritiously enough food, especially in countries already hit by hunger and other crises even before COVID-19.

## Bühler introduces modular grain cleaning system

Bühler has introduced Vitaris, a modular system for grain cleaning that allows millers to produce a high-quality final product in a reliable and efficient manner.

When wheat and other grains arrive at the mill, they contain many different types of impurities that have entered the mix at different stages. Metal, stones, weeds, other grains and general debris can all become part of the mix during growth, harvest, storage and transportation. Shrunken, broken, diseased and damaged grains have to be removed.

If these impurities are left in the mix, it will affect the quality and odor of the final flour and may pose a health risk. Certain impurities also affect machine efficiency. Cleaning is therefore an essential step in the milling process and one that, ultimately, has the most significant impact on the quality of the flour. Removing each of these different types of impurity requires a different process — and therefore a different type of machine.



**Vitaris – a modular system for grain cleaning.**  
*Photo courtesy of Bühler.*

The Vitaris modular cleaning system consists of four combinable machines with minimal space requirements and energy saving technology. As standalone modules each machine performs a specific task in the grain cleaning cycle removing and separating fine and coarse particles and impurities.

Millers can deploy individual machines or add and combine machines from the start or at a later stage, according to their individual requirements. With a small physical footprint, Bühler's overall cleaning system, as well as each individual

component deliver a space efficient solution. This was achieved by designing smart machine layouts in which individual elements and components are stacked vertically.

In addition, consumption of fresh air was reduced in a version that recirculates air. Advanced air-recycling technology reduces the amount of fresh air needed by up to 90% and, subsequently, reduces the overall filter surface and thus maintenance. Instead of manually regulating the air flow by flaps, adjustments are performed via electrical frequency converters saving up to 15% of energy. All machines within the system are prewired. Connected to the plant's power supply at one central point no additional cabling is required and installation costs are kept to a minimum.

The Vitaris cleaning system is comprised of four machines:

- Air-recycling aspirator MVST for removal of dust and light particles before cleaning
- Separator MTRD for sorting course materials from fine particles
- Combistoner MTCH for removal of impurities with a higher specific weight and classification of grain into high-density and heavy fractions
- Recycling air aspirator MVSS for removal of fine impurities and dust

The Vitaris separator MTRD achieves a high throughput of up to 24 tons per hour in the cleaning process and up to 50 tons per hour for pre-cleaning at the grain intake in silos.

Optionally, an air-recycling unit can be connected upstream or an aspiration channel downstream.

Stainless steel sieves, FDA-approved plastic parts

and the omission of nails, plush and felt allow high sanitary standards. In addition, the closed design of the machine prevents any foreign parts from falling into the product. Re-using most of the cleaned process air, the Vitaris combistoner MTCH efficiently separates mixed and high-density products and impurities with specific weight such as stones and glass. Thanks to the integrated recirculating air separators the machine requires little fresh air thus saving energy.

The integrated dust separation is available with fresh air or air recycling operation. The combination of destoner and concentrator allows for separation of particles with high specific weight, such as stones and glass, and division of flow of materials into high density and mixed fractions.

Separating different products according to their specific weight, the compact Vitaris aspirator MVST requires only a minimum of space. Thanks to the centrally placed feeder device, the MVST requires only a minimum of installation height. For non-free flowing products an active feeder device is available.

The air-recycling aspirator MVST takes up 30% less in height than systems utilizing air-recycling aspiration channels. The air-recycling aspiration channel MVSS is energy efficient. The improved geometry of the aspiration channel ensures an optimal airflow across the whole width of the MVSS avoiding deposits. Meeting highest food safety standards there are no dead spots at the inlet and the aspiration channel is sealed. Fresh air consumption is reduced by up to 90% and energy consumption by up to 15%. For non-free flowing products, a feeder device is available that distributes the product over the entire width of the sieve.



## SE Asia grain, oilseed demand declines

The coronavirus (COVID-19) pandemic and African swine fever (ASF) are negatively impacting grain and oilseed demand in Southeast Asia in 2020, sending consumption in that region for wheat, corn, soybeans and soymeal down by

1.6%, according to a report released June 30 by Rabobank International.

The five countries comprising Southeast Asia in the report — Indonesia, Malaysia, the Philippines, Thailand and Vietnam — are seeing a significant decline in feed consumption, with demand expected to decrease by 3.2% year-on-year compared to an average year-on-year increase of 5.8% over the last five years.

"Around 64% of total annual major grain demand in the five countries is used for animal feed," said Oscar Tjakra, senior analyst for grain and oilseeds at Rabobank. "Hence, the decrease in grain and oilseed use for animal feed outweighs the increase in grain and oilseed use for human consumption."

The report noted that human consumption for the major grains in Southeast Asia is projected to increase by 1.4% in 2020, compared to a 3% year-on-year increase last year and an average incline of 3.9% the last five years.

Wheat imports to the region are forecast to grow by 1.4% in 2020, following growth of 3.7% in 2019 and an average of 4.8% the last five years.

Among the five countries, total demand for major grains is expected to decrease the most in the Philippines, which will see a drop of 3.2% in 2020. Indonesia is forecast to perform the best with flat total demand this year.

Rabobank said demand for milling wheat will be the biggest contributor to the increased demand of major grains for human consumption in 2020.

"Milling wheat demand from the bread (artisanal and whole meal), cake and pastry subsectors is expected to decrease across the five countries in 2020, due to slow recovery in the foodservice industry and consumers' lower disposable incomes," Tjakra said. "However, milling wheat use for instant noodles and biscuits is expected to remain healthy."

## EU feed demand jumps in 2019-20

EU feed demand is expected to tick up 2 million tonnes to a total 84 million tonnes for the 2019-20 marketing year, according to the European Commission's EU feed protein balance sheet for 2019-20.

"Roughage, such as grass and silage maize, remains the main source of feed protein, representing 45% of total EU feed use, an increase of 2% compared to 2018-19," the European Commission said.

"The share of all oilseed meals has decreased by 1%, representing 25% of total feed use in the EU. Finally, cereals continue to be available in ample supply, at 20% of total feed use."

The EU's feed self-sufficiency has reached 78% due to the increased availability of roughage while at the same time its feed self-sufficiency is pressured by its lowered availability of rapeseed (meals).

"In terms of self-sufficiency, the EU is fully self-sufficient in roughage," the European Commission



said. "However, for oilseeds meals, the EU only produces 24% of what it needs to feed its livestock sector."

The coronavirus (COVID-19) has caused a decrease in biofuel demand and a 7% drop of rapeseed availability, which was partially offset by increased soybean imports. It also decreased demand for beer, and in turn barley, weakening the malting sector. Yet a 6% increase of barley use was seen in feed.

This balance sheet report includes the EU and UK as the UK was still a member of the EU at the beginning of the marketing year.



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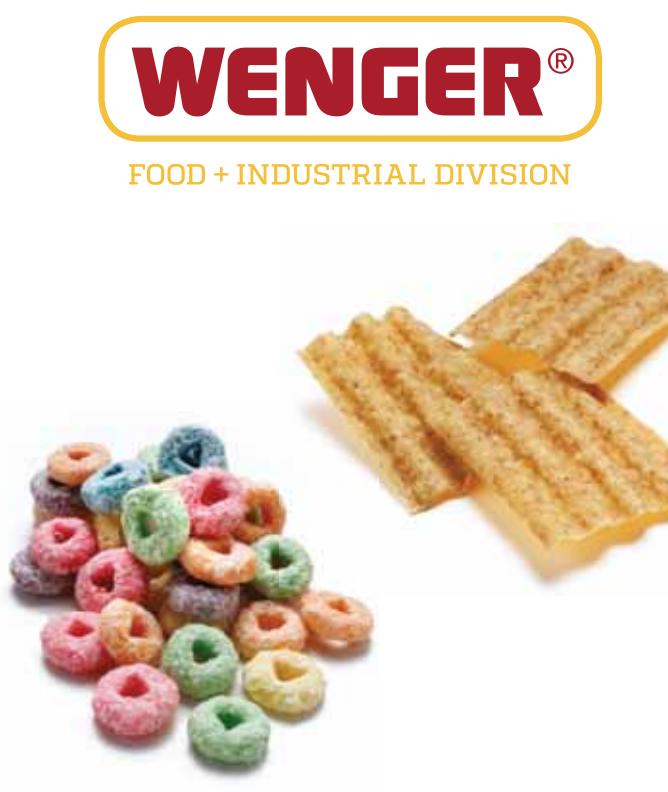
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