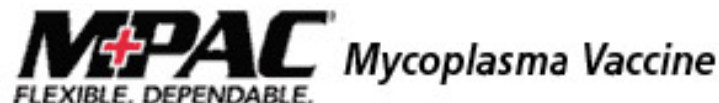




April 26, 2007

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### Your fast-track guide to reports in this issue:

- Welfare tops the agenda
- Small changes for Europe's sows
- European probe on Salmonella
- PRRS strikes in Vietnam and Italy
- Integrators and processors
- Omega venture in Europe
- Philippines watches its export status
- Canada examines competitive weakness
- Swine fever in Croatia
- Shows and seminars
- Updates on companies
- People in the news
- Data in brief
- Latest job opportunities
- Send us your news

An advertisement banner for M+PAC Mycoplasma Vaccine. On the left, there is a photograph of a pig sitting in a blue leather chair. To the right of the photo is the M+PAC logo and the text 'Mycoplasma Vaccine' and 'FLEXIBLE. DEPENDABLE.'. Below this, there are three bullet points: '&gt; Higher antibody titers', '&gt; Faster acting, longer lasting protection', and '&gt; Excellent syringability'. In the bottom right corner, there is a blue triangle containing the text 'For more info. CLICK HERE'.

## Welfare tops the agenda

Animal welfare has become the topic of the moment for pig industries in several parts of the world, even competing with feed grain prices for a share of the headlines. In Australia, a council of Primary Industries ministers from across the country endorsed a major revision of the national Model Code of Practice for the Welfare of Animals: Pigs and agreed to develop a plan for its implementation. The revised code is said to “provide for consistent and improved animal welfare outcomes in a way that will allow the industry to efficiently meet public expectations for the welfare of pigs”. Welcoming the endorsement, Australian Pork Ltd chief executive Andrew Spencer said the unanimous acceptance of the code by all state and territory governments provided the way forward for unified animal welfare standards to be regulated nationwide. Adopting the code would create extra costs for producers to alter housing systems as required, in line with changes occurring internationally to limit the use of gestation stalls within 10 years. New sow stalls will need to be larger from 2007 and increased space allowances for other stock must be met from 2012. An industry first in Australia is that the code includes the regulation of standards for competency and skills training of stock attendants.

A Latin American perspective of animal welfare is being presented this week to a congress in Montevideo, Uruguay, that is supported by world animal health agency OIE and the European Commission. The meeting of representatives of international agencies seeks to give an overview of new horizons for animal welfare in the 21st Century. Within Europe, a survey of consumer attitudes to animal welfare has been published ahead of a welfare conference being held in May in Berlin, Germany. Carried out by Unni Kjærnes of the National Institute for Consumer Research, Oslo and 7 other European research institutes or universities as part of a European Union-funded research programme, it canvassed 10 500 consumers in 7 countries of Europe and Scandinavia. The importance of farm animal welfare was agreed by 69% of people questioned in the Netherlands, 73% in the UK, 75% in France, 83% in Hungary and Sweden, 84% in Norway and 87% in Italy. Most people thought that conditions for farm animals had improved in the last 10 years. But their attitudes were not always reflected in their food-buying decisions. Compared with the French and Italians, for example, Hungarians took less notice of animal welfare in their food shopping while the Dutch considered welfare when buying eggs and beef.

Earlier, the European Commission released the findings of a Eurobarometer welfare-attitudes survey questioning 29 152 people in the 27 EU states and also Turkey and Croatia. This found over 70% of people supported offering financial rewards to producers who applied high welfare standards and 89% were in favour of the view that imports should have to be produced under the same animal welfare conditions as those originating in the EU. Some 62% of respondents said they were willing to make an extra effort to buy welfare-friendly products, even if this meant changing where they shopped or paying more for goods. However, they wanted better labels to indicate the animal welfare standards met in producing the food.

The possibility of an EU animal welfare label on meat products was discussed again at a community-level conference on animal welfare labelling options held in March, with the European commissioner for health expressing his support of the concept. Markos Kyprianou said, “I am convinced that good animal welfare offers a competitive advantage for European producers; the Commission is ready and willing to help them take advantage of this by improved labeling. An animal welfare labelling system is not a burden or an additional cost, it is an extra opportunity.” He added that the idea was to introduce a two-tier scheme. The first level would label foods which complied with minimum EU standards of animal welfare while the second level was a kind of ‘welfare plus’ scheme in which labels could be applied on a voluntary basis. This could include a ranking system based on stars — with more stars being awarded to the more stringent EU producers.

In North America, Cargill Pork has become the latest major pork operator to declare its intention of phasing out

gestation stalls in favour of group housing for pregnant sows. Most estimates put the company in the Top 10 of US pork enterprises for sow numbers. In letters sent to animal welfare lobbyists, Cargill Pork president Dirk Jones said the company had been moving towards group sow housing for the past 4 years. It had already converted more than half of the accommodation on company-owned and contract production farms. Its announcement comes soon after North American corporations Smithfield Foods and Maple Leaf revealed their decision to phase out stalls in gestation, and fast-food restaurant chain Burger King said it would purchase more pork from sources that did not use sow stalls for gestation, with the aim that this would reach 20% of all purchases by the end of 2007.

Denmark meanwhile imposed an immediate ban on exporting live pigs outside the EU area and moved to stop any live-pig exports involving journeys of more than 24 hours, after revelations of breaches of transport welfare rules in deliveries to Russia. Weaned pigs on one shipment died, apparently through neglect, and the documentation on other shipments had been falsified to show wrongly that the pigs had been rested during long-distance transport by road.



### **Small changes for Europe's sows**

A slight increase of only 0.7% has been recorded for total sow numbers in the EU-25 area at the end of 2006, in figures compiled by statistics bureau Eurostat. As the accompanying [Table](#) demonstrates, the count of 14.97 million sows for the 25 member countries of the European Union was virtually the same as in the 2 previous years, but below the 15.2 million sows found in 2003.

The change from year to year varied according to country. Among the 5 biggest EU countries for sows there were increases for Spain and Denmark, but reductions for Germany, Poland and France. Percentage changes ranged from the plus 6.9% of Italy and 5.5% of Denmark to minus 6.3% in the Czech Republic and minus 8% in Sweden.

### **European probe on Salmonella**

Public health risks posed by the presence of Salmonella in pigs are to be assessed in Europe by a consortium of institutes co-ordinated by the European food safety agency (EFSA), to prepare for new targets on reducing the bacterial contamination of pork products as part of the community-wide programme of achieving a reduction in food-borne diseases.

The risk assessment procedure will examine sources of infection for slaughter pigs at farm level as well as the impact of the slaughter processes on carcase contamination. These results are to be analysed to form a basis for predicting how the prevalence of Salmonella in pigmeat would be affected by reducing the number of bacteria carried by pigs at slaughter.

Pigmeat is among foods blamed for the cases of Salmonella food poisoning in people in the European Union each year. Salmonellosis is the most frequently reported zoonotic disease. It was responsible for 192 703 out of

400 000 examples of zoonoses causing clinical disease in humans in the EU area in 2005.

### **PRRS strikes in Vietnam and Italy**

An outbreak of PRRS affecting more than 11 000 pigs in the northern Vietnamese provinces of Hai Duong, Hung Yen, Bac Ninh and Thai Binh has been reported this month (April) by Vietnam's Ministry of Agriculture. The disease originated on farms in Hai Duong. According to a Vietnamese News Agency report, many of the pigs had died. An estimated 3000 infected pigs were sold at local markets before farmers were aware of the outbreak. Producers have been asked to stop selling pigs or pork until the outbreak is brought under control. A vaccine is being made available to breeding herds.

In Italy, reports at the 2007 show Rassegna Suinicola in Reggio Emilia suggested a change in the customary pattern of PRRS in the country's sow herds. Italian producers until now have considered PRRS to be a disease that is most troublesome in the winter months. For 2007, however, it seems to have remained relatively quiet over the winter and waited for the onset of spring before causing a fierce episode of abortions and reproductive failure. Veterinary advisers in Italy say no satisfactory explanation for the change has yet been found.

### **Integrators and processors**

Smithfield Foods in the USA said the US Justice Department had delayed its plan to acquire Premium Standard Farms. The department's anti-trust division originally had 60 days to review the plan, but then exercised its option to extend the deadline by a further 30 days. This additional period expires on 7th May.

Investments in livestock production in Romania are to be undertaken by Romanian meat processor Aldis. Currently it manufactures products from meat imported from Brazil, USA and Canada. But now Aldis will invest up to €14 million in developing its animal production activities and in installing an integrated management system to control everything from the farm to the factory. Another €1 million will be invested in building a wastewater treatment plant this year.

Russian pork producer/processor Cherkizovo Group is growing its interests in poultrymeat by buying Chicken Kingdom, one of the largest poultry producers in Russia. The deal also strengthens Cherkizovo's position in the central region of the European part of Russia, since Chicken Kingdom has operations in the south-western regions of Lipetsk and Bryansk.



Thailand-based agribusiness group Betagro has completed a capacity upgrade of its processing plant for pork products in response to rising export demand. The expansion increases the plant's potential throughput from 1200 pigs to 2000 pigs per day.

Free-range pork company Niman Ranch in the USA has announced adding 41 producers since January this year, to give the group a total of over 500 family farms in 12 American states.

Pig processing in Ireland by McCarrens Meat Processors of Cavan is being expanded through an investment of €2.5 million with the support of Enterprise Ireland.

Zimbabwe's major pork processor, Colcom Holdings, is reported locally to have stepped up measures to boost pig production through a contract grower scheme launched in November 2006 by its Triple C division. Extra output is needed to satisfy the export market, says the report. The Pig Industry Board expects national sow numbers to reach 50 000 next year from a present level of 20 000 sows. Between 1995 and 2000, the sow inventory in Zimbabwe reportedly dropped from 14 000 to just 9000 because of poor prices.

Finnish meat company Atria has taken over Swedish food processor Sardus, following the go-ahead from Sweden's competition authority. Atria has said it is looking at the possibility of investing in meat procurement and slaughterhouse operations in southern Sweden.

Profits for Chinese meat processor Yurun Food Group rose by 36.3% last year as the group's turnover increased to RMB 4.72 billion, from RMB 4.45 billion in 2005. Production capacity was enlarged in its plant in north-east China and at factories in the east of the country. Yurun is expected to announce plans for a new pig slaughterhouse venture, sources indicating that the group has placed an order to buy the slaughtering equipment from a European supplier.

Also in China, processor Zhongpin has opened a US\$3 million expansion at its main production factory in Henan province. The expansion increases its output capacity for prepared meat products by 75%, to 25 200 metric tons/year. Beijing's largest agri-food integrator, Sanyuan, confirmed it is expanding the subsidiary based in Chengdu, Sichuan province, that is involved in producing pigs and milk. The US\$100 million complex was opened in July 2006.

Fire severely damaged a pig slaughterhouse at Blans in Denmark operated by Danish Crown, which said it was ready with an emergency plan so total slaughter capacity would be restored quickly.

### **Omega venture in Europe**

A new company called Vitomega bv has been started in the Netherlands to produce omega-3 pork. During the last year it has developed a chain from primary production and slaughtering to trade and butchery in the north of the Netherlands, with support from local government and the Dutch ministry of agriculture, to secure and arrange sales of the enriched meat. A European launch of the Vitomega chain is planned for 2007.

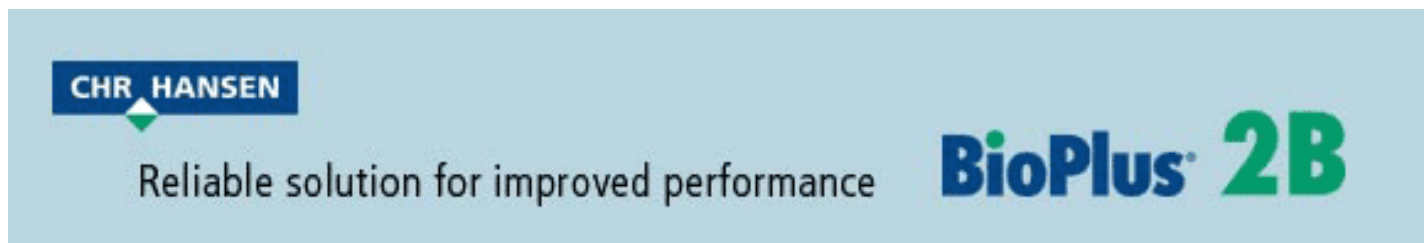
The scheme is based on giving a guarantee on the quality and content of long-chain omega-3 fatty acid DHA in the pigmeat. Its commercialisation follows 4 years of testing and development, using a patent-pending method of enriching meat originated by the R&D department of UK-based breeder JSR. Company directors at Vitomega talk about a minimum 300% increase in the pork's content DHA with scientific proof from university work in the Netherlands and Belgium that there is no adverse effect on the meat's taste, smell or structure.

### **Philippines watches its export status**

Exports of pork from the Philippines to Singapore could start in July this year, government secretary of agriculture Arthur Yap has said in Manila. He indicated a starting quantity of about 300 metric tons. The Philippines is also considering exporting pork to Japan, Hong Kong, Korea and China. The country exports only about 2% of its production, which is estimated to reach 1.9 million tons this year.

Mr Yap said the department of agriculture had a budget of P20 million for the pig industry's support systems, such as new laboratories, land and buildings to ensure that the meat is safe and meets world standards. The funds will be released after the elections in May.

But producer leaders at the pig trade show organised by the National Federation of Hog Farmers' Inc (NFHFI) called for government action to protect the official health status of exporting zones by guarding against imports that could introduce foot-and-mouth disease. The entire Visayas region and Mindanao are recognised as FMD-free by world animal health agency OIE, but there has been no similar verification of status of Luzon although parts of it are regarded by the Philippines government as being free of the disease.



Many countries still will not import from these areas until there is independent verification from the OIE, said the federation. In the same manner, the government needed to pass a bill that would allow imports only from areas which were OIE-verified as FMD-free. The biggest threat was from carabao meat imports originating from such areas. These had increased from 9000 tons/year in the mid-1990's to more than 60 000 tons today.

### **Canada examines competitive weakness**

Leaders of Canada's pork sector have called for government assistance to address difficulties in competing internationally, against the backdrop of an analysis for the Canadian Pork Council that producers in Canada have a cost disadvantage of about C\$5 per pig compared with those in the US Midwest. The analysis by economic research organisation George Morris Centre said a strong Canadian dollar and labour shortages for meat processors were the biggest problems, with processing plants slaughtering 425 000 pigs/week on average in 2006 compared with a capacity of 480 000 pigs/week. Secretary of state for agriculture Christian Paradis said the government's 2007 budget to support producers called for new investments of C\$1 billion across Canada, including C\$600 million for farmers to kickstart new savings accounts and C\$400 million to help producers deal with high production costs.

### **Swine fever in Croatia**

Veterinary specialists have been sent to Croatia by the European Commission to assess the country's outbreaks of classical swine fever and assist with the disease situation on the ground. Swine fever is widespread currently in Croatia, a candidate country to enter the European Union. It has had about 60 outbreaks found so far this year, including in regions close to the borders with Hungary and Slovenia. The EU experts are to co-operate with the Croatian authorities in analysing epidemiological data and outbreak patterns and look at the measures being taken to tackle the disease.

### **Shows and seminars**

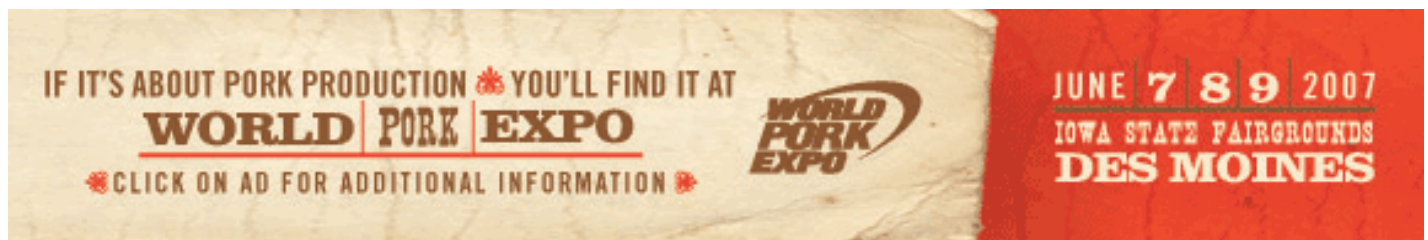
Modern Pig Breeding 2007 international conference has been announced for Kiev, Ukraine, on 15th June 2007. It will include Ukrainian and international speakers on production management, processing and waste disposal issues.

Denmark's annual Agromek show will be held twice in 2008 as it prepares to change from its traditional slot in January each year. After the edition already announced for 15th-19th January, Agromek will take place again 25th-29th November 2008 and then will be held annually each November in future. It will contain farm livestock equipment and services every year, while adding field machines every second year.

AgroFarm exhibition to be held at the All-Russian Exhibition Centre in Moscow, Russia, 19th-21st June 2007 will feature a Pig Investment Center, say organisers DLG. The presentation will be a market place bringing together pig farm equipment producers, finance institutions, investors and agricultural producers. They will deal with the issues of investment planning and funding. A business forum will operate as part of the Investment Center.

Expoaviga of Spain has chosen dates of 15th-18th April 2008 for its next edition at the Gran Via showground outside Barcelona, so moving to a spring-time slot instead of the autumn period previously occupied by the biennial event on livestock and poultry production technologies.

Thai company NCC Exhibition Organizer has unveiled plans for the first Ildex China livestock show, to take place 10th-12th October 2007 at the China International Exhibition Centre in Beijing. For this opening edition, the organisers expect over 80 exhibitors from around the world and 20 000 visitors from China's livestock and dairy professionals and farmers. The same organising group has set dates in 2008 for Ildex Vietnam (3rd-5th April in Ho Chi Minh City).



### Updates on companies

PigTek Pig Equipment Group has been formed as an internal business unit of CTB to focus exclusively on products and projects for the pig industry worldwide. George Murdoch is named its managing director. Last year, CTB bought European pig equipment manufacturers Laake GmbH (Germany) and Porcon Beheer bv (Netherlands). The new unit will co-ordinate product development, manufacturing and sales for Laake, Porcon and Chore-Time pig equipment brands, operating through a new facility of 4200 square metres in Germany and a 5400m<sup>2</sup> site in the Netherlands as well as from its headquarters in Indiana, USA. The US centre will deal with sales in the USA while PigTek's German location takes care of Germany and other countries of western Europe, with the Netherlands office focusing on Europe, Latin America and Asia.

Plasma protein company APC Europe has appointed Speerstra Feed Ingredients of the Netherlands as its new exclusive feed-ingredients distributor in the Benelux countries and Germany. APC Europe has a central warehouse in the Netherlands for fast distribution into north-west and eastern Europe. The agreement particularly relates to sales of plasma protein AP 820 and haemoglobin AP 301 (powder) or AP 301GS (micro-granulated).

Heat lamps manufacturer InterHeat has moved one of 2 production lines from Korea to its new site in China and aims to transfer the second line by the end of May. It will mean the end of production in Korea for the company, but it plans to double output when the Chinese site is in full operation. The move is also a platform for

penetrating the market in China more deeply. China currently represents about 5% of company sales, but the intention is to grow this to 30% in 2008. Its Korea office remains as the international contact point for sales.

Danbred International is now the official name of the breeding-pig export company in Denmark that formerly included SEA in its title. It will also use its corporate identity in Germany, where Danzucht becomes a product name.

A move into marketing pig equipment has been unveiled in the USA by the local arm of WestfaliaSurge, better known until now as a manufacturer of milking machines for dairy herds. A member of Germany-based group GEA, the company has expanded in North America by acquiring manure-handling systems specialist J. Houle & Fils Inc of Quebec, Canada and announced plans to market these systems to pig units internationally.

Feeding systems specialist Weda in Germany has appointed Spanish equipment company Egain to be its exclusive distributor in Spain.

Boehringer Ingelheim in Germany has reported an 11% growth to €10.6 billion for net sales in 2006. Operating income was also up by 11% at €2.1 billion. The group's animal health business grew by around 4% to €374 million, but the increase was 8% before the effects of acquisitions and divestments.

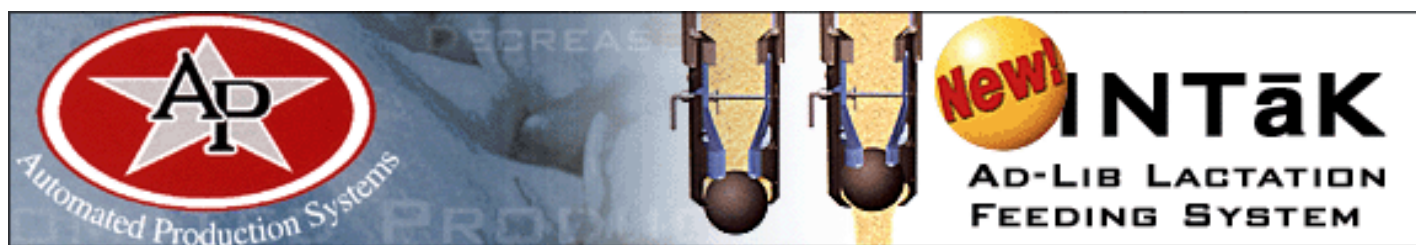
Water medicator manufacturer Dosatron International in France has been bought by Hamilton Sundstrand, a division of the American group United Technologies Corporation. While continuing to operate under its own name, Dosatron will become part of Milton Roy, a Hamilton Sundstrand company that produces pumps and systems for fluid mixing and flow control.

Kenpal Farm Products Inc of Ontario, Canada, has purchased the business and assets of Canadian feed premix producer International Stock Food Co Ltd. Kenpal will manufacture ISF products and gains a national distribution network of its agents.

Trouw Nutrition International becomes the exclusive distributor in the European and North American markets and in the main part of the Asian Pacific area for feed ingredient Fibosel from Lallemand Animal Nutrition of France. The product is a source of activated  $\beta$ -glucans to stimulate animal immune response mechanisms.

An AI gene transfer service has been launched in the Ukraine by UPB CIS, a registered Ukrainian company representing UK-based breeder UPB. The company recently established a 1200-sow GGP/GP breeding complex for a local agribusiness to populate and maintain an integrated commercial production enterprise of 10 000 sows.

BASF is discontinuing its lysine business and will shut down its production facility in Gunsan, South Korea, by mid-2007 in order to concentrate on its non-amino acids business. Lysine is the only amino acid in the company's nutrition portfolio. It says the business is no longer sustainable due to rising raw material costs, over-capacities and a high dependency on exports. The Gunsan site has a current capacity for lysine of around 100 000 metric tons per year. The closure is part of the ongoing restructuring programme of BASF's fine chemicals business, initiated in January 2006. Among other measures, this has included the merging of the human nutrition and animal nutrition businesses into one nutrition unit as of November 2006 and the divestment of the global premix business, a major part of which was sold to Nutreco in February this year. BASF intends concentrating on the production and marketing of important non-amino acids such as vitamins, carotenoids, enzymes and organic acids.



### **People in the news**

Dr Gordon Allan of the department of veterinary sciences, Queen's University, Belfast, Northern Ireland, received the 2007 Porco Bravo award at Italy's Rassegna Suinicola trade fair, in recognition of his research work to understand the PCV2 circovirus infections affecting pigs worldwide.

Steve Langley becomes general manager of Osborne Industries in the USA while Stanley Thibault remains as chairman of the board, following transfer of 100% of shares from Mr Thibault and 3 minority stockholders to a so-called ESOP stock ownership plan representing the company's employees. Ron Thibault PhD continues as vice-president of marketing and engineering. In addition to a pig product range that includes Big Wheel feeders and Team and Weight Watcher automated management systems, Osborne has a parallel business moulding engineered composite plastic parts for other companies. It has subsidiaries in China (Osborne Livestock Technical Company) and in the UK (Osborne Europe Ltd).

Impextraco of Belgium has appointed Ir. Tom Vanderborcht as technical-marketing manager for the Power-Protexion range of feed products.

Dr Carlos Peralta, based in Mexico, has joined the worldwide development team of British breeder JSR Genetics.

Christian Schirvel DVM MSc has been promoted to group director for business development at Vetoquinol in France. He also joins the group's management committee, replacing Patrick Bellon.

Animal identification specialist Destron Fearing in the USA has named Sue Brown as product manager responsible for developing marketing plans and overseeing all marketing communications for the company's portfolio of products.

Jason Zhu has been appointed general manager of PIC China. With more than 19 years of agribusiness experience in China and Canada, he is a graduate of Northwestern Agricultural University, Shaanxi, and the University of Saskatchewan.



### Data in brief

Russia's pork imports rose by 11% in 2006 despite a fall of 40% in the quantity imported from Brazil, noted the Meat and Livestock Commission in the UK. The shortfall was covered by increased imports from Denmark and Germany and other EU countries as well as the USA and Canada. It was the third consecutive year that Russian import of pigmeat had increased.

Denmark shipped 17% more live pigs to other countries last year, on Danish data, equivalent to an extra 527 000 weaners. Total live exports exceeded 3.8 million pigs.

USA's March 2007 inventory of 61.1 million pigs was up 1% from a year earlier, said the US department of agriculture. Breeding pig numbers were 1% lower at 6.08 million.

China exported 227 000 tons of pork products between June and November 2006, 18.9% more than in the equivalent period of 2005, said the Chinese ministry of agriculture. Higher exports helped pig prices to recover from a decline over the previous 2 years. Another boost to prices had come from a downturn in the number of pigs marketed, after sow numbers were reduced in several major pig-producing provinces. In Hunan province, for example, the sow inventory fell by 6.4% during 2006.

Bosnia and Herzegovina contained a total of 9690 sows at the end of 2006, said the federal office of statistics. The number of pigs marketed last year showed an increase of 6.1% compared with 2005, with annual pork production up by 2.9%.

France requires approximately 500 000 F1 replacement gilts per year for its sow herds and 2 genetics organisations supply 50% of them, according to French industry estimates.



## Latest job opportunities

Our help wanted listings aim to inform pig professionals about employment opportunities worldwide. Contact our sales staff at [gstadel@wattnet.net](mailto:gstadel@wattnet.net) for more information on placing a listing in upcoming issues.

### Big Dutchman

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As recognized market leader of the entire industry and to put our future plans into practice, we rely on the commitment and initiative of our staff members. Because of this we are always looking for enthusiastic and interested personalities to add to our dynamic team of approximately 1150 employees worldwide.

*We would like to further strengthen our sales area Pig and are currently seeking (m/f):*

#### • Sales Manager Asia

who will guide, advise and support the distributors in this sales area responsibly and who will also expand our distribution network.

For this position we are seeking for a sales personality who ideally already has experience in the sale of agricultural investment goods and also a sound knowledge and experience in pig production. Initiative and organizational skills are further important requirements for this challenging position.

You will be active in the sales area, analyze the market situation, develop sales strategies and furthermore you will be contact person for our customers. We guarantee a sufficient period of vocational adjustment and an intensive training program. For this position excellent communication skills in English are mandatory and the Sales Manager will be **based in our office in Bangkok**. The position requires frequent travelling.

#### • Sales Manager Western Europe

Following a thorough training on the job you will be responsible for further establishing and enlarging our distribution network. You will guide a sales team but will also be participating actively in the sales business yourself. Moreover, you will have to analyse the market development and be responsible for the development and implementation of marketing and sales strategies.

For this position we are seeking for sales personalities with poise and outstanding communicative skills who ideally already have experience in leading a sales team. Also for this position excellent communication skills in English are mandatory and the Sales Manager will be **based at our headquarters in Germany**. The position requires frequent travelling.

*Are you interested in one these versatile tasks in our dynamic and sales-driven team? If so, please send us your*

*application, including CV and indicate your salary expectations. Your application will, of course, be treated in strict confidence!*

*Do not hesitate to call us if you have any questions regarding this position!*

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## Calendar

The dates shown are given in good faith, but please check with the organisers in each case. Details of new events for possible listing should be sent to: Calendar, PIG INTERNATIONAL, 3AQ Lavant House, Lavant Street, Petersfield, Hampshire GU32 3EL, England. e-mail: [best@watt-4.demon.co.uk](mailto:best@watt-4.demon.co.uk)



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## Contact Information

We are always interested in hearing from you. Please e-mail [best@watt-4.demon.co.uk](mailto:best@watt-4.demon.co.uk) with your thoughts about this service. Contact [lorsted@wattnet.net](mailto:lorsted@wattnet.net) if you want to unsubscribe or to send us the e-mail address of other industry professionals to add to our subscriber list.

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