

Servicio de Investigación Agroalimentaria  
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**Sumarios de Publicaciones Periódicas nº 9**

1ª quincena MAYO 2003



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## Highlights

- Commission pledges new GM guidelines
- Feed producers to bear onus for safety
- NZ premier pleads for WTO round focus
- Australia attacks EU regional food labels
- Talks to begin on EU-W. Africa trade deal
- Sugar industry row over WHO study
- SARS effect brakes US soya price rally



## GM co-existence guidelines to be issued soon, says Commission

EU member states could see guidelines from the European Commission by the summer on managing the 'co-existence' of genetically modified (GM) and non-GM crops - a development which might help dismantle one of the last impediments to restarting the stalled process of authorising new GM organisms (GMOs) in the Union.

Speaking this week at a 'round-table' discussion on co-existence held by industry experts, consumer groups and other interested parties, EU Agriculture Commissioner Franz Fischler signalled that the Commission was making good progress in its efforts to formulate advice for dealing with this thorny issue.

"I hope that the results [of the discussion] will also help us to draw up a first set of guidelines on co-existence before the summer," he said.

If achieved, this step would add to pressure on those EU member states currently blocking market authorisation of new GMOs in the Union to drop their opposition.

Austria, Belgium, Denmark, Finland, France, Greece, Italy and Luxembourg have imposed a *de facto* moratorium on new authorisations on the basis of a number of concerns, some of these safety-related.

The Commission has taken the line - reiterated by Fischler this week

- that the authorisation procedure already deals properly with safety issues, and that co-existence is an exclusively economic issue - i.e. that it revolves around the need of farmers obtaining a premium for GM or non-GM crops to protect that added-value (see also page N/2 this issue).

### New pressure on GM sceptics

But rightly or wrongly, co-existence problems number among the pretexts used by the 'rebel' member states to justify their moratorium, and their available ammunition in the authorisation debate may begin to run low if real progress is made, as Fischler hopes, towards "a rational and efficient approach" to ensuring effective co-existence.

### Green lobby wants firm rules

On the other hand, the 'hands-off' approach currently favoured by the Commission has not met with approval from all quarters.

Fischler re-emphasised this week that it should be for member states to determine how best to ensure  
(Continued on page EP/2)

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# sumario

30 ABR. 2003



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La industria cárnica de porcino continúa su proceso de integración vertical

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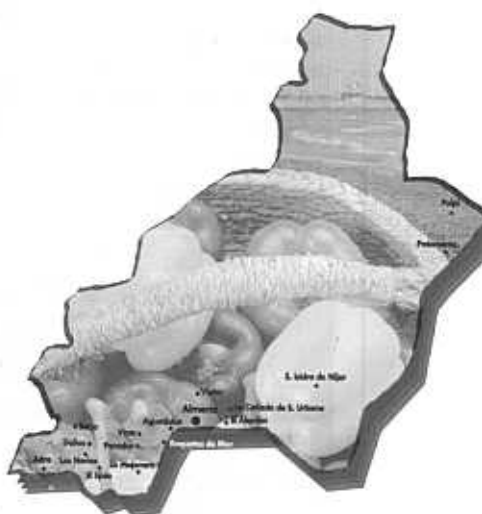
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El mercado de palets de madera mueve un negocio próximo a los 160 M.EUR



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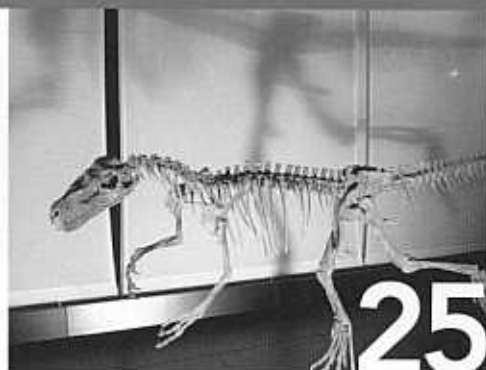
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## Cinca Medio

Cada casona, cada palacete... atesoran la sabrosa historia de un personaje o un destacado episodio cultural. Sin duda, el Cinca Medio tiene sabor medieval.



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Pasar un día divertido a la vez que se aprenden algunos de los secretos de la Paleontología es posible visitando Teruel y el resto de sedes del parque temático Dinópolis.



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Juan José Sanz Sanz (Garganta de los Montes, Madrid, 1939), ingeniero industrial, es desde 1993 presidente de Opel España, la mayor empresa de Aragón.

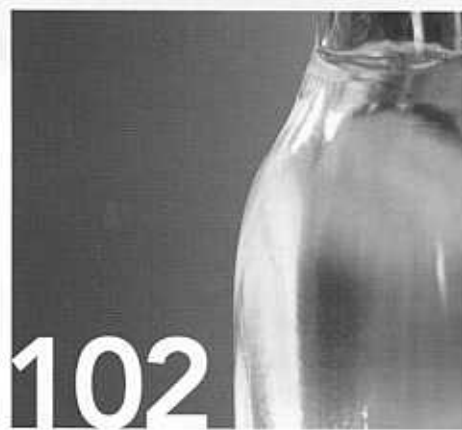
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## Bajo Aragón

El Bajo Aragón, la Tierra Baja como la llaman sus moradores, ofrece atractivos suficientes como para merecer una pausada visita.



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## Aceite de Aragón

Podemos decir con orgullo que el estandarte de la cocina mediterránea se borda en oro fino en las tierras de Aragón. Nuestro aceite de oliva es sinónimo de la calidad y el buen hacer de nuestras almazaras.



## Seis bodegas con encanto

El mundo del vino apasiona cada vez a mayor número de personas que disfrutarán recorriendo las seis bodegas que proponemos en el presente reportaje.



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### Editorial

30 ABR. 2003

Estimados Amigos, iniciamos un nuevo año de nuestro Boletín, tan asombrados que repitiendo pensamientos populares: quien hubiera pensado que después de tantas cosas ocurridas en Argentina, llegamos a marzo del 2003.

El campo tiene una nueva oportunidad, algo alentadora; la posibilidad de un cambio de gobierno siembra siempre esperanzas en nuestros inocentes y fértiles corazones. Este año, después de mucha insistencia a distintos niveles, se reactivó el Comité Técnico Asesor del SENASA, del cual formamos parte en los proyectos técnicos-legislativos, se está preparando una nueva resolución sobre el etiquetado de los productos, para normalizar definitivamente la disparidad de criterios para el etiquetado de envases y sobre-envases.

Existen otros proyectos bajo estudio, pequeñas modificaciones a la Resolución 350/99, reglamentar los productos de trato diferenciado (aquellos que no pueden encuadrarse dentro de agroquímicos y/o fertilizantes), y un tema por demás preocupante el costo y las exigencias para la inscripción de laboratorios extranjeros, requisitos adicionales de registro que otorgarían duplicada validez a los documentos presentados, añadiendo tiempos considerables para la finalización de las tramitaciones de registro.

Lamentablemente, han sido hasta la fecha infructuosa nuestra gestión para formar parte en las nuevas Comisiones creadas por la Dirección de Sanidad Vegetal del SENASA, sobre temas puntuales como carpocapsa, flores de corte, etc., donde se encuentran integrantes tanto del área oficial como privada, en este último caso casi exclusivamente comercial, con una total ausencia de entidades técnicas como ASAPROVE ocupadas en el tema de la protección vegetal y ambiental.

El Área roja del SENASA sigue distanciada del Área verde, con diferencias aparentemente infranqueables; temas, como la aftosa, son prioritarios y otros relacionados con la agricultura son secundarios. Si bien, pueden las autoridades estar dedicadas exclusivamente a un tema en particular, como la aftosa o la autarquía, el resto "debe" ganarse su lugar y no quedarse murmurando en los rincones.

Fríos o calientes, pero nunca tibios. Si en definitiva la preocupación es el bien común, tanto en ese nivel como en todos los estratos de la vida, existen montones de maneras de participar para que las cosas cambien. Participar es la única manera de empezar a cambiar, para volver nuevamente a los valores, que realmente nos hacen grandes como personas y por añadidura como Nación.

Ing. Agr. Augusto Piazza  
Vicepresidente

### Una enfermedad que incide en la calidad del girasol

*Estrategias para combatir la podredumbre húmeda del capítulo.*

La podredumbre húmeda del capítulo del girasol (PHCG) es una de las enfermedades más importantes de este cultivo en la Argentina. Además de pérdidas de producción, provoca serios inconvenientes en el proceso industrial. El agente causal es el hongo *Sclerotinia sclerotiorum*, que ataca durante el período

de floración, especialmente si coincide con días nublados o frescos, de alta humedad ambiental.

Los cuerpos del hongo contaminan el grano y provocan desgaste y roturas en la maquinaria de molienda. Por otra parte, la enfermedad genera un aumento de la acidez del aceite, motivo de descuentos en la comercialización.

Durante las Jornadas sobre Calidad de Granos, el Ing. Alberto Escande señaló que no existen cultivares inmunes, aunque en el INTA Balcarce se detectaron

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En el mes de agosto de 2002

## Aragón ha perdido en cuatro años la mitad de sus productores de vacuno de leche

Los productores de vacuno de leche aragoneses no son ajenos a la grave crisis que vive el sector y que está poniendo en peligro la viabilidad de las pequeñas explotaciones familiares ganaderas.

Esto es lo que se puede desprender de los datos ofrecidos por algunas asociaciones agrarias de Aragón. Mientras que en 1999 existían en Aragón un total de 500 explotaciones, un año después se han reducido hasta 336. Actualmente apenas queda la mitad de aquel medio millar de ganaderos que se contabilizan hace sólo cuatro años, según las cifras facilitadas por la Unión de Agricultores y Ganaderos de Aragón (UAGA). La situación se repite en el conjunto nacional, donde de las 200.000 explotaciones que había hace diez años tan sólo quedan alrededor de 43.000.

A pesar de la desaparición de explotaciones, Aragón mantiene el número de cabezas de vacuno de ordeño que se sitúa a torno a las 19.000 animales, con una producción que ronda los 78 millones de litros de leche. De ellos, 36 millones proceden de las explotaciones oscenses, 39 millones de las ganaderías de la provincia de Zaragoza, mientras que la producción de Tuel sólo alcanza los 3,5 millones de litros de leche.

La progresiva caída de los precios pagados por la industria láctea y unas cuotas de producción insuficientes para la rentabilidad de las explotaciones explican la crisis que vive este sector, que en Aragón tiene una destacada presencia en las comarcas de La Litera, Ribagorza y Monegros en Huesca y en el entorno de Zaragoza.

El responsable de los servicios técnicos de UAGA, Pedro Navarro, explica que "la existencia de mucha leche 'negra' -fuera de cuotas- y la decisión unilateral de las industrias de reducir progresivamente el precio que se paga al productor" están acentuando las dificultades de un sector para el que la reforma de la Política Agraria Comunitaria (PAC) prevé también una progresiva reducción de los precios de intervención. Navarro destaca

que "la pasividad de la Administración y el carácter perecedero de la leche" deja a los ganaderos en manos de las industrias a las que todas las organizaciones agrarias acusan de "pagar los precios más bajos de toda la Unión Europea".

Y es que, según el representante de UAGA, el coste de producción de un litro de leche alcanza los 0,29 euros, mientras que la industria está pagando por este producto 0,28 euros, con lo que "así es imposible mantener la rentabilidad y viabilidad de las explotaciones, especialmente las pequeñas ganaderías familiares". Precisamente en Aragón, el 77% de las explotaciones de vacuno de leche tienen menos de 50 animales de ordeño. El 22% dispone entre 50 y 300 animales y sólo una explotación -Tauste Ganadera- sobrepasa esta cifra, con

alrededor de 3.800 vacas de ordeño.

Esta situación ha creado, asegura Navarro, "un clima de malestar entre los ganaderos" que se ha manifestado en numerosas protestas realizadas por toda España. Aunque Aragón no ha sido escenario de ninguna de estas movilizaciones, sus productores "sienten y comparten la incertidumbre y pesimismo que vive el sector", matiza.

### Plan de choque

Todas las organizaciones agrarias -COAG, UPA y Asaja- han trasladado reiteradamente al MAPA la necesidad de poner en marcha un plan de choque que haga frente a la precaria situación que caracteriza al sector lácteo español. Así se lo trasladaron el próximo día 22 al ministro Arias Cañete, en una reunión en la que los ganaderos solicitaron "una respuesta a esta crisis, que está suponiendo una reconversión salvaje que amenaza la forma de vida de miles de familias, al tejido rural, al medio ambiente y la calidad de los lácteos que consume la sociedad".

Las organizaciones exigen el establecimiento de un precio mínimo de la leche que, según COAG, no debería ser inferior a los 0,33 euros.

### Última reunión del Comité Científico Director

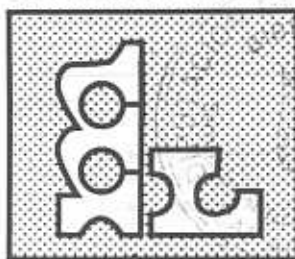
Después de seis años de su creación, el Comité Científico Director de la UE mantuvo los pasados 10 y 11 de abril su última reunión. A partir de ahora, la Autoridad Europea de Seguridad de los Alimentos será la que tendrá la responsabilidad de asesorar a la Comisión en cuestiones de seguridad alimenta-

ria. El Comité se creó en 1997 y desde entonces ha emitido 270 dictámenes, ha consultado a más de 200 expertos de 25 países y ha proporcionado la base científica para más de 30 propuestas legislativas. En su última reunión, emitió 19 dictámenes sobre varias cuestiones que quedaban pendientes.



# MULTICAJA

Caja Rural Aragonesa y de los Pirineos



Del 18 abril al 1 de mayo de 2003

Núm. 1.840 - Año XXX

La UE proroga hasta el 12 de mayo el embargo a la exportación de pollos y huevos de Bélgica y Holanda

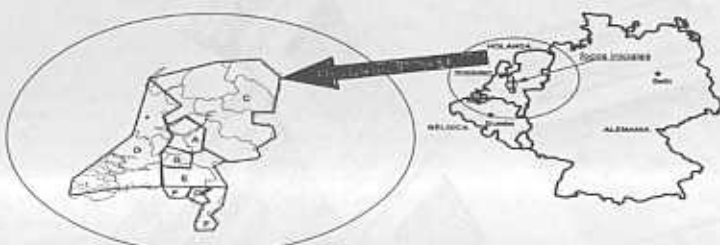
Los estudios que está realizando Holanda sobre el riesgo de que el virus de la influenza aviar pueda afectar como enfermedad a los cerdos están demostrando que esta posibilidad es muy baja. Por ello, el ministerio holandés de Agricultura decidió el pasado viernes 25 levantar la prohibición de transportar cerdos en las zonas cerradas por influenza aviar (ver mapa), que ha estado vigente desde las vigilas de Pascua, el 16 de abril. El "calendario" de la evolución de esta epidemia aviar en Holanda y Bélgica durante las dos últimas semanas, que ha comportado un importante bloqueo de la disponibilidad de ganado porcino en el norte de Europa, ha sido el siguiente:

\* **15 de abril:** Bélgica confirma su primer foco de influenza aviar, en una granja avícola situada cerca de la frontera con Holanda. Inmediatamente, se suspende cualquier movimiento de pollos, huevos y derivados dentro del país y, al día siguiente, Bélgica anunciaba también la prohibición de exportar estos productos, medida que ratificaba después la Comisión.

\* **16 de abril:** El ministerio de Agricultura holandés prohibía el transporte de cerdos en las zonas cerradas por influenza aviar, que afecta, entre otras, las provincias de Gelderland y una parte de Brabante del Norte, ambas con una amplia cabaña de porcino e importantes mataderos en su interior. La medida se tomó en base a unos estudios que indicaban que los cerdos pueden transmitir el virus de la influenza: se examinaron trece explotaciones del Valle de Gelderland (centro de la epidemia) y se encontraron anticuerpos en los cerdos de cinco de las mismas. El gobierno "dividió" Holanda en

## HOLANDA LEVANTA LA PROHIBICIÓN DE TRANSPORTAR PORCINO EN LAS ZONAS CERRADAS POR INFLUENZA

COMPARTIMENTOS VETERINARIOS CREADOS EN HOLANDA PARA EL CONTROL DE LA INFLUENZA AVIAR



compartimentos veterinarios que ha realizado Holanda para combatir la epidemia: las zonas A, B y G son en las que se prohibió inicialmente el movimiento de ganado porcino.

\* **22 de abril:** Holanda oficializa los resultados de las investigaciones encargó para comprobar si los cerdos son agentes transmisores de la influenza. La conclusión sustancial es que la peste aviar no se propaga por el porcino, y que los cerdos que tengan anticuerpos no se pueden considerar enfermos. A pesar de ello, todavía no hay ninguna decisión de levantamiento de las inmovilizaciones, que se mantienen por otra semana de forma preventiva. Además, el ministro de Agricultura holandés, Kees Veerman, confirmaba oficialmente ante el Parlamento, en respuesta

escrita a una interpelación parlamentaria, que la influenza aviar fue la causa de la muerte del veterinario de 57 años fallecido en Holanda la semana anterior. El virus encontrado en los pulmones del facultativo era, según el ministerio, "idéntico" al de la epidemia que sufre la cabaña. Este veterinario, que cayó enfermo dos días después de haber estado trabajando en una granja infectada, es la primera víctima humana atribuida a este virus de la influenza. Años atrás, hubo precedentes en Hong Kong, si bien entonces el agente ya había mutado a gripe humana. Las autoridades sanitarias holandesas recomiendan que se mediquen todas las personas que tengan contacto con aves infectadas.

Ese mismo día, Bélgica anunciaba también su cuarta sospecha de foco de influenza en su territorio, muy cerca de la frontera con Holanda.

\* **23 de abril:** El Comité de la Cadena Alimentaria y Salud Animal (ex-comité veterinario) se reunía en

La próxima sesión de lonja de Mercolleida se celebrará el miércoles, 30 de abril de 2003, a partir de las 18:00 horas, por ser el jueves 1 de mayo festivo

Anche in questa edizione di aprile la nostra rivista riesce a proporre ai lettori un paio di reportage da importanti manifestazioni estere. Alludiamo al servizio proveniente dalla Fruit Logistica di Berlino pubblicato a pag. 29 e a quello dal Jarditec di Parigi pubblicato a pag. 51.

Il primo articolo è costituito dagli appunti di un osservatore d'eccezione, ossia il presidente di Mercati Associati nonché neo direttore del mercato ortofrutticolo di Padova Francesco Cera. Il quale non manca di sottolineare come la rassegna tedesca, che resta il principale punto di riferimento europeo in materia di ortofrutta, abbia offerto anche quest'anno spunti di grande utilità anche per gli operatori del nostro Paese, presenti alla rassegna numerosi e con grande convinzione.

Per esempio scrive: "Chiara il messaggio emerso sia dalle discussioni che dagli stand. L'ortofrutta italiana è chiamata a reagire all'avanzata dei nuovi competitor dandosi un posizionamento chiaro e preciso all'insegna della qualità e della tipicità, arricchendo un prodotto che sia di fascia alta, con un contenuto di servizi sempre più sofisticato". Infatti a Berlino era chiaramente percepibile, continua Cera, il boom che stanno vivendo la quarta e la quinta gamma, mentre nel segmento commodities la concorrenza appare difficilmente contrastabile, a causa della massa di prodotto e dei bassi costi di produzione.

Forte la presenza di espositori italiani (fondamentalmente produttori e commercianti del comparto florovivaistico) anche alla manifestazione oggetto dell'altro reportage citato, il salone francese Jarditec. Il nostro inviato Claudio Ferri dà conto delle loro proposte anche con una corposa documentazione fotografica.

Infine sottolineiamo la nascita di una nuova rubrica: si chiama "Ornamentali, la difesa" ed è curata dal Centro di sperimentazione e assistenza agricola di Albenga (Sv). La sua prima edizione esce questo mese a pag. 98. Non sarà l'unica novità nell'ambito del nostro panorama rubriche, ne ripareremo nel numero di maggio.

Giorgio Setti

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**BERLINO AL MONDO ORTOFRUTTICOLO: QUALITÀ E TIPICITÀ VINCONO**  
(il reportage di Francesco Cera da Fruit Logistica è a pag. 29)



**JARDITEC, SALONE FRANCESE MA RICCO DI PROPOSTE ITALIANE**  
(il reportage di Claudio Ferri da Parigi è a pag. 51)





## LA QUINZAINE &gt;&gt;&gt; P. 3

## Quinze jours d'actu en grandes cultures

## TECHNIQUE &gt;&gt;&gt; P. 14

## Identifier le taupin à abattre

Il n'existe pas un maïs des taupins. Cette découverte relativement récente émane d'un groupe de travail régional né en 1998 qui s'est enrichi au fil des mois avec l'arrivée d'un certain nombre d'intervenants permettant, en 2001, de créer un groupe national Acta - CTIFL - Inra - ITCF et chambres d'agriculture.

## Technique et machinisme

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## GESTION &gt;&gt;&gt; P. 26

## Réforme Fischler : le revenu s'en va

Les estimations régionales des conséquences de la réforme de la politique agricole commune commencent à se préciser. En région Centre, la chambre d'agriculture prévoit qu'une exploitation céréalière de 98 ha perdrait 40 % de son revenu.

## L'observatoire des marchés

Les indices et les cours. Lire P. 29

## SYNDICALISME

30 AVR. 2003

## L'amende amère

Les syndicats ont tous condamné comme une atteinte au droit syndical la lourde amende infligée à la FNSEA et à cinq fédérations pour entente illicite sur le prix de la viande bovine en 2001.

On s'attendait à une union syndicale agricole contre le projet de réforme de la politique agricole commune. Celle-ci se cherche encore. Mais l'union et la rébellion se sont tout de même faites contre la Commission européenne. La levée de boucliers a été rapide après l'annonce de l'amende de 16,7 millions d'euros contre la FNSEA et les syndicats de la filière viande pour entente illicite à l'occasion de la dernière crise de la viande bovine.

Le 9 avril, la FNSEA et Jeunes Agriculteurs comptaient 15 000 responsables syndicaux mobilisés durant deux jours de contestation. C'est moins que les 80 000 envisagés. Les préparations des terres, les semis de betteraves, les déclarations Pac, les irrigations par endroit expliquent en partie ce retrait. Le syndicat majoritaire se déclarait « pleinement satisfait de la forte mobilisation de leurs représentants sur tout le territoire. Ces journées ont été l'occasion pour de nombreux parlementaires d'apporter leur soutien à la FNSEA et à Jeunes Agriculteurs et de dénoncer avec force l'atteinte au droit syndical », estiment les deux centrales syndicales.

Revenons sur l'historique de l'affaire. Le 2 avril la Commission européenne impose une amende de 16,7 millions d'euros à six fédérations agricoles françaises pour avoir violé en connaissance de cause les règles de concurrence de l'Union européenne en octobre 2001 afin de protéger le marché français de la viande bovine frappé par la crise de la vache folle. Ces organisations agricoles sont accusées d'avoir conclu un accord sur les prix, qui concernait essentiellement les viandes de vache de réforme, pour limiter les importations, ce qui, selon Bruxelles, constitue deux des violations les plus graves du droit de la concurrence.

La Fédération nationale des syndicats d'exploitants agricoles (FNSEA) est condamnée de 12 millions d'euros. Les Jeunes Agriculteurs et la Fédération nationale bovine (FNB) sont frappés de respectivement 600 000 euros et 1,44 million d'euros. Les autres condamnés sont la Fédération nationale de l'industrie et des commerces gros des viandes, la Fédération nationale de coopération bétail et viande et la Fédération nationale laitière (FNPL). >>>

Les FDSEA et JA de Lorraine ont manifesté le 7 avril devant la maison natale de Robert Schuman, père fondateur de l'Europe, à Scy-Chazelles en Moselle.





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# the Exchange

The newsletter of the American Agricultural Economics Association

130 ABR, 2003

## From the President

### 1999 Annual Meeting a Success for AAEA

The Nashville meeting was a resounding success, with attendance near an all-time record. The Foundation fundraiser at the Grand Ole Opry exceeded expectations, attracting participation of over 100 individuals. I would like to extend a special thanks to AAEA Meetings Manager Nancy Herselius and AAEA Executive Director Donna Dunn for the outstanding awards program in Ryman Auditorium, former home of the Grand Ole Opry, and the wonderful entertainment that followed the program. It will be a hard act to follow next year (especially the line dancing!) but we will try.

Mark your calendar for next year's meeting which will be located in an excellent new Marriott hotel and conference facility in Tampa. The theme for next year's meeting will emphasize both the economic history of agriculture in the 20th Century, and the economic future of agriculture in the 21st. I encourage creative proposals for all types of sessions related to these themes. Don't hesitate to contact me if you have ideas you would like to discuss.

I would also like to remind members that the deadline for submission of nominations for the board of directors and officers is **October 15**. With our system of at-large elections to the Officers, Executive Board, and Foundation Board, providing the nominating committee with names is an important way for members to help maintain an effective representation of our diverse membership.

AAEA is making some important changes in the way it operates. AAEA is undertaking some exciting new initiatives while working hard to maintain its historical intellectual and institutional foundations. Probably the most important change in the past year — but one that may be the least visible to members — is the implementation of a

professional management staff for the AAEA business office in Ames, under the leadership of AAEA Executive Director Donna Dunn. Many important changes are taking place to improve the quantity and quality of services AAEA provides to members. A good example is the ongoing development of the AAEA home page. An important new initiative that we will be working on this year is a process to improve our understanding of what services members want from AAEA.

I plan to use this space as a way to highlight important information about key AAEA activities. In the remainder of this column I would like to highlight changes taking place in the production and distribution of AAEA publications.

The AAEA Board decided last year that it would be in the Association's interest to have AAEA publications produced and distributed by commercial publishers. A key motivation was to maximize the impact of our publications by taking advantage of world-wide marketing and distribution networks and the electronic distribution capabilities of a major publisher. AAEA selected Blackwell Publishers, the leading publishers of economics and related scholarly journals, to publish the *AJAE* and *RAE*.

Beginning with the first issue of 2000 the *AJAE* and *RAE* will be distributed to AAEA members and subscribers in both print and electronic media. One of our objectives will be to further develop electronic distribution, including the option of receiving journals in electronic-only form at a reduced cost. This option should enhance the attractiveness of the journals to our members and to the wider economics profession.

There are a number of other attractive features of the agreement with Blackwell, including reduced institutional rates for non-

OECD countries and 150 free subscriptions for developing country institutions. The AAEA leadership will be working with the International Committee to devise a strategy to select institutions where these free subscriptions are likely to have the greatest impact.

At its August meeting, the Executive Board developed a plan to unbundle all of its publications. This means that you will have the choice of a membership with all publications (*AJAE*, *CHOICES*, and *RAE*), as well as the choice of a membership without any of the publications with a membership fee reduced by the marginal cost of producing and distributing each publication. This proposal was approved by the members at the AAEA business meeting in Nashville.

As we move into another year at AAEA, we look forward to more success and improvements. I look forward to working with everyone to strive for a better AAEA.

John Antle

### 2000 Annual Meeting to be held in Tampa, Florida

Watch for future articles on the program and other information for the July 30 – August 2, 2000 annual meeting to be held in Tampa, Florida. You will receive information on the benefits of attending the conference in the "Heart and Soul of Florida." Watch your mail for special information.

If you have any questions, contact Nancy Herselius, Meetings Manager, 515-233-3202, ext. 14; Fax: 515-233-3101; Email: nancy@aaea.org.


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# Exchange

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30 ABR. 2003

## From the President

### 2000 Meetings Theme; New AAEA Initiatives

"Agriculture, Technology and Policy: Retrospect and Prospect" will be the theme for the AAEA 2000 annual meetings in Tampa. With the help of an ad hoc meeting planning committee, I will be working this fall and winter to incorporate this theme into the plenary sessions and other sessions. We would particularly welcome proposals for organized symposia and free sessions that explore either historical or forward-looking aspects of this theme.

Working with the AAEA Executive Board, AAEA Committee chairs, and the leadership of AAEA sections, I intend to develop several new initiatives this year. I would like to use this article to outline those initiatives and I invite your comments ([jantle@montana.edu](mailto:jantle@montana.edu)).

#### Information Management Initiative

I believe that one of the most valuable services that AAEA can provide to members is to help them access and manage the blizzard of information that is available. I intend to appoint an ad hoc committee to explore how AAEA can better serve members in this regard, including how best to utilize the AAEA's web site and related services. I invite any members interested in this initiative to contact me by email.

#### Industry Initiative

In early 1999 the Industry Committee held a workshop entitled Respond-

ing to the Need to Serve Industry Ag Economists. The workshop made a number of recommendations. One was for AAEA to learn more about professional ag economists working in industry; another was for AAEA to expand services that would be of value to industry ag economists and establish a more positive brand identity with professionals in industry. In response to these recommendations, AAEA is developing a database of industry ag economists, and will consider what additional services it may be able to provide.

I believe that, above and beyond AAEA's responsibility to serve members of the ag econ profession who work in industry, AAEA can better serve all of its members by encouraging and enhancing interactions among all segments of the profession. As a step toward that goal, I have invited the Industry Committee to propose three organized symposia for the 2000 meetings that would be of particular interest to industry ag economists. Members with ideas for these sessions are invited to contact the Industry Committee co-chairs, Joyce Cacho

([j.a.cacho@nyc.rabobank.com](mailto:j.a.cacho@nyc.rabobank.com)) or Nicholas Kalaitzandonakes ([sskala@muccmail.missouri.edu](mailto:sskala@muccmail.missouri.edu)).

#### Annual Meeting Initiative

One of the most important services AAEA provides its members is the

annual meeting. Almost half of AAEA members attend the annual meetings each year. Over the past decade the annual meetings have changed significantly—commercial venues have replaced land grant university sites, pre- and post-conference workshops have been added, and a number of other changes in program design have been introduced. Along with these enhancements in the meetings, the registration and housing costs have probably increased in real terms.

Other important aspects of the meetings, notably the time of year when they are held, has not changed. Planning annual meetings is a highly complex and involved process that must be done four to five years in advance. To better manage this process and serve its members, AAEA needs systematic input from members about their preferences for meetings. Given the time lags involved in planning meetings, AAEA also needs to look to the future and maintain flexibility.

I will be working with the AAEA Business Office to develop a mechanism this year to obtain systematic input from members about their preferences for annual meetings.

John Antle



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## From the President

### Proposed New Mission and Vision for AAEA in 2000

A key component of AAEA's strategic plan, drafted in 1996, was to develop a shared vision for AAEA. Earlier this year a Strategic Audit Committee, chaired by Mark Drabenstott, reviewed AAEA's progress in implementing its strategic plan. The Committee noted in its report that AAEA had not yet developed a shared vision to guide its decision making.

During the past 18 months since I became a member of the AAEA Board of Directors, I have reflected on what AAEA is and could be. During an Executive Board meeting last year, the issue was stated clearly. A Board member observed that in the past AAEA was primarily a scientific society that served the needs and interests of academic agricultural economists. To serve this group's interests, AAEA functioned well as a "small tent" organization. But now agricultural economists are becoming an increasingly diverse group of professionals that work in universities, government, and the private sector. To serve this larger, more diverse group, AAEA needs to become a "large tent" organization.

At the same time, our goal must be to create an organization that provides better service to AAEA's traditional constituency while better serving other groups of ag economists.

I have translated the big tent metaphor into the following vision statement for AAEA:

*AAEA strives to be the leading professional organization for all economists who work in agriculture, food, resource and allied fields.*

The word "leading" is used because AAEA is and must continue to be the preeminent such organization and because it must lead, not follow. The word "all" connotes our desire to be the "big tent" organization for our profession.

When the Strategic Plan was established, a mission statement was also adopted. I am proposing a new mission statement that is based on the view that the services AAEA provides to its members should be demand-driven. I also believe that AAEA members want the association to undertake activities that serve the public interest:

*AAEA's mission is to provide those services deemed by its members to meet their professional needs, and to enhance the profession's contribution to the public good.*

To achieve this vision and mission, AAEA must be able to continue to provide and improve its key services, such as the annual meetings, awards, and publications, while also reaching out to the growing number of professionals in the private sector and other fields. AAEA also needs to play a more active role in enhancing the contribution of our profession to the public good, for example, by taking a more active role in communicating research findings to public and private decision makers.

Last year the AAEA Executive Board adopted a policy to allow for the creation of self-governing Sections. Sections provide a means for members to undertake activities that in the past were

performed by the AAEA's subject matter and special interest committees. Some committees, such as Extension, have become sections, and others have not. The main function of several committees is to organize events for the annual meetings. I believe that AAEA would function more effectively if the committee activities that support the Executive Board's decision making (annual meeting planning, nomination, awards, finances, advisory functions) were consolidated into a small number of committees. I believe that the remaining functions, such as organizing special interest or subject matter programs outside the annual meetings, should be delegated to Sections or to ad hoc committees.

I believe that these organizational changes are needed to more efficiently serve AAEA members and to fulfill AAEA's public service role. I encourage all AAEA members to express their views on these matters to me or to other members of the Executive Board (email addresses and phone numbers are on the AAEA Executive Board Web page at: <http://www.aaea.org/bod.html>).

John Antle

### Renew Your Membership Today!

Renew your AAEA Membership today to ensure uninterrupted benefits and subscriptions.

You can renew on-line at <http://www.aaea.org/membership.html> or call the AAEA office at 515-233-3202 for an application.



# the Exchange

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30 ABR. 2003

## From the President

### Report from the December Board Meeting; Industry Track for the Tampa Meeting

At its Fall meeting, in early December, the Executive Board reviewed the Association's finances and approved an annual budget. I can report that AAEA remains financially sound with a healthy asset base. In 1999 AAEA had a small operating deficit, but that deficit is expected to increase to about 10 percent of the 2000 budget. This expected deficit was approved by the Board with the understanding that some of the current expenditures represent investments in new programs and services to members that should increase future revenue. If that does not happen in the near future, the expenditure side of the budget will be reduced to bring the budget into balance.

The Fall Executive Board meeting is coordinated with the Foundation Board so that the two groups can meet jointly. This meeting focused on a discussion of AAEA strategic objectives and implications for fund raising. Also, the leadership agreed to appoint an Investment Committee to oversee AAEA's investments and related matters.

Another important task for the Fall Executive Board meeting is the selection of the Principal Paper sessions for the summer meetings. Several Board members expressed concerns about the quality and suitability of the proposals. One concern is that the only review these papers receive is through the abstracts submitted with the proposals, yet some proposals provide little more than titles and authors of papers. The Board would like to see a clear description of how each paper will contribute to the session. Another concern is that many of the

proposals appear to be a collection of journal articles, with individual papers proposing to present theory, data, and empirical results in 12-15 double-spaced pages! What the Board is looking for is set of papers designed to inform members of the profession about an important topic effectively within the constraints of time and space available for Principal Papers.

A major topic of discussion at the Board's Spring meeting (to be held in early April in Ames) will be strategic issues. In addition to the long-term financial strategy, the Board will be reassessing AAEA's strategic plan. Issues to be discussed include the degree of federation and decentralization the AAEA should have, and how Sections will be integrated into the organizational structure of AAEA. Another key topic is how AAEA implements a "big tent" strategy for services while serving the members of the original "small tent" better (for more on this, see my article in the last issue of *the Exchange*).

#### *Industry Track for the Tampa Meetings*

One of my goals for this year is to work with the Industry Committee co-chairs Joyce Cacho and Nicholas Kalaitzandonakes to create more participation by industry ag economists at the annual meeting. Our main strategy is to create an Industry Track of sessions on Monday (a "track" is a set of related sessions) designed around industry themes and with participation by leading industry ag economists. These sessions should be an outstanding addition to the program this year and should appeal to a wide cross-section of all AAEA members. We

will be advertising the Industry Track widely to the profession through the usual media and using a database of industry ag economists that AAEA has been assembling.

Another innovation we are experimenting with this year is a "Hot Topic" session. The goal of this session is to allow an important topic to be discussed at the meetings that was too recent to be planned with the nine-month lead time required for regular sessions. Check it out at the meeting and let us know what you think!

### **AAEA Elections Feature On-Line Voting**

Last year AAEA offered the option to vote for president-elect, Executive Board directors and Foundation Governing Board members through a secure location on the AAEA web site. A recent decision by the AAEA Executive Board expands that opportunity for the 2000 elections.

All AAEA members without valid email addresses in the office database will receive a paper ballot by mail. Those members may vote by mail or go to the web site and cast a ballot.

All AAEA members with valid email addresses in the office database will receive an email with on-line voting instructions. Those receiving this email may still opt to vote using a paper ballot by making that request to the AAEA office.

AAEA elections take place April 15-May 15, 2000.



# the Exchange

The newsletter of the American Agricultural Economics Association

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## From the President

### Executive Board Approves Innovations for Annual Meetings

If you are like me, every time you hear someone talk about "strategic planning" or "shared vision," you wonder whether anything useful is being accomplished. Yet, during my tenure as AAEA President I have come to understand that a vision and strategic plan are essential tools for a successful organization in a dynamic world. It's just common sense: the vision is where we are going, the strategic plan is how we get there.

In the January issue of *the Exchange*, I expressed the vision that AAEA should be the leading professional organization for economists in agriculture, food, and allied fields. AAEA clearly is our profession's leading organization, but to maintain and enhance its position it must change and grow. Its growth must be not only in membership, but in the quality and variety of services it provides. At its Spring meeting, the Executive Board voted to implement several innovations for the annual meetings consistent with this vision.

The first innovation is to move toward a 4-year rotation of meeting sites, with three recurring sites and a "wildcard" site every fourth year. Since the AAEA began using commercial meeting sites, almost every meeting has been held at a different site. There is no doubt in my mind that the use of commercial sites has greatly enhanced the quality of the meetings. The use of a rotation would provide several additional advantages.

First, AAEA's meetings are increasingly becoming a focal point for allied organi-

zations. A rotation will facilitate coordination with these organizations. Second, a rotation will help AAEA obtain the best facilities at lowest cost. A rotation will reduce the costs of searching out new locations, and allow us to negotiate better room, food and facility rates. The wildcard provides flexibility to try new locations and make changes in the recurrent sites when it is advantageous to do so.

The 2001-2003 meetings are scheduled for Chicago, Long Beach, and Montreal. At the April meeting, the Board approved Baltimore, Denver, and Long Beach for the rotation, beginning with Denver in 2004. Other cities on the short list for the rotation were Montreal, Toronto, Minneapolis, Salt Lake City, Seattle and San Diego. Let the Board know what you think about these sites!

AAEA also is striving to be innovative in the organization of the annual meetings. One goal is to provide members with more ways to make creative and effective use of the annual meeting venue to communicate their work and learn from others.

All members now may submit proposals for principal papers, organized symposia, free sessions, and selected papers. Many members as well as the Board believe that it is useful to link some sessions together into a "track," or a set of related sessions. In fact, tracks have been used successfully in our meetings for several years, but they were proposed on an *ad hoc* basis. The Executive Board voted to establish a procedure for placing

tracks on the program. Beginning with the 2001 meetings, AAEA committees and sections will be able to submit track proposals at the same time that proposals for principal papers are due (typically, about October 15). These proposals may include principal papers, organized symposia, and free sessions.

Further details will be provided in the 2001 call for proposals in the September issue of *the Exchange*. The Executive Board welcomes suggestions about how to implement this innovation - remember, Executive Board members' names and email addresses are on the AAEA home page. Members are encouraged to start making plans now to submit track proposals for the 2001 meetings.

A final note. The Spring Executive Board meeting was held in Ames, April 7-8, and the Board visited the AAEA's business office. It's a fine facility, and AAEA members visiting Ames should take the opportunity to visit the office and meet AAEA's outstanding staff.

John Antle

#### Cast your ballot

Ballots were distributed to all 2000 AAEA members for the 2000-2003 president, board and Foundation board member election. These ballots were distributed electronically to all members who have valid email addresses in the AAEA office, and by mail to all others. Please vote. Voting ends May 15, 2000. Your ballot must be cast electronically, or received in the mail on this date.



# the Exchange

The newsletter of the American Agricultural Economics Association

30 ABR. 2000

## From the President

### Riddles and reasoning: Why meetings have themes



Recent annual meetings have had an announced theme.

For the 2001 meetings in Chicago it will be "Agricultural

Economics at the Margins: Expanding Our Reach and Deepening Our Understanding." The idea behind the theme is that we should focus on creatively pushing onward in our scientific work, and by analogy with farming this can be done at either the intensive or extensive margin.

Isn't this what we are doing anyway? I hope so. The alternative is to keep doing just what we have been doing. This works better in farming than it does in teaching, extension and research - and it doesn't work that well in farming.

In practice, however, it is hard to do new things. Today's nutrient management plan often turns out to be indistinguishable from yesterday's manure spreading. Roughly the same is true in academic work.

Some have questioned the idea of having a theme.

Does it mean that submissions for principal paper sessions, selected papers and other elements of the program are expected to fit the theme? No. As was stated in the

reminder e-mail that went to all members (who have e-mail addresses) on Oct. 12, 2000, the theme is not meant to limit the kinds of papers or sessions that will be presented. Rather it is intended to provide a possible stimulus for members proposing principal papers and symposium sessions or writing papers, and for the AAEA Board to keep in mind as we put the program together.

Might having a theme straightjacket our otherwise unhindered imaginations? And, even if having a theme is not unduly restraining, why do it? Why not just let x flowers bloom?

One thought is that, for some of us individually and for all of us as a community of professionals, provision of an opportunity to focus stimulates productive efforts. Many of us can function well, thank you, without such corralling. But it is sometimes the case that people who, seeing a vast open space before them, just wander; when given a suggested narrowing or constraint, something more valuable ensues.

Georges Perec had writer's block but produced an amazing novel under the constraint that he not use the letter "e" (*La Disparition*, translated as *A Void*, HarperCollins, 1994). Poets too are said to benefit from having to express themselves under

requirements of meter or rhyme.

On the other hand, we're not doing fiction, I hope.

Turning to something completely different, since some space remains I offer the following pop quiz:

Fill in the blanks in the following actual quotation with the appropriate interest group: "In tandem with their allies in politics and the ever-gullible press, \_\_\_\_\_ have managed to secure a long-running lobbying triumph: an abundance of public money, few knowledgeable questions about how the money is used, and a sympathy-inducing image of perilous deprivation. The achievement is all the more remarkable because the \_\_\_\_\_ lobby has abstained from endorsing political candidates or giving them campaign cash. In times of prosperity for \_\_\_\_\_, its champions complain of dangerous neglect and wistfully recall happier times gone by - which, ironically, rang with similar complaints of neglect."

I'll give the answer in the next *Exchange*. Or, you can look it up, in the *Chronicle of Higher Education*, March 26, 1999, p. A72.

Bruce Gardner



# the Exchange

The newsletter of the American Agricultural Economics Association

30 ABR. 2001

## From the President

### Committees help AAEA face challenges



**M**any tasks of AAEA are carried out by committees. This spreads the work and gets a greater variety

of member voices involved than if carried out by the board or the business office. Developments in sections and the business office have, however, reduced the need for some committees, and if you will check the committee list on the AAEA Web site you will see that some committees of former days are now gone. On the other hand, two new committees have been created. They are currently ad hoc committees, which may be discontinued, altered, or evolve into different entities in future years, depending on how they work out.

The first of these is a Member Communication and Web Site Management Committee. It is chaired by Rob King and its members are Louise Letnes, Stefanie Mercier and Kevin McNew. Their immediate task is to review and give

advice on the maintenance and improvement of the AAEA Web site. The longer-term charge of the committee, for which purpose it may be enlarged in future years, is to propose and evaluate all manner of communication between the AAEA business office/board and the membership at large.

The second new committee, on priorities and governance, has a more general charge: to advise the board on means of implementing the recently adopted AAEA Vision Statement, which can be summarized as a "big tent" vision of our Association. The committee is asked to address ways to enhance the sense of all members of AAEA that they are fully appreciated and can influence AAEA policies and programs, including but not limited to recommendations concerning representation on committees, the board, awards and AAEA programs.

The committee is chaired by Ron Knutson and its members are Julie Caswell, Cathy Kling, Dan Bernardo, Ralph Cristy, Matt Holt, Mark Lange, Nancy Norton, Susan

Offutt and Dawn Thilmany. I am pleased that everyone I asked to serve on this committee immediately agreed to do so. This speaks to their appreciation of the importance of the task set to them and the alacrity with which they will undertake it. I hope.

The general rationale of committee restructuring is to move away from committees with a semi-autonomous mission (which now may evolve into sections) and toward a set of committees more closely tied to advising the AAEA board and facilitating the main AAEA missions.

The answer to last issue's fill-in-the-blank quiz is: Science. The quoted statement is by Daniel Greenberg, author of the book *The Politics of Pure Science* and many articles on that subject.

— Bruce Gardner



# the Exchange

The newsletter of the American Agricultural Economics Association

## From the President

### Making dollars and sense: AAEA's financial future



**O**ur Association has been spending at a rate well above its revenues for several years. Much of our deficit was anticipated as a result of our loss of Iowa

State University as provider of office space and in-kind services, moving to our headquarters to our own offices in Ames, and hiring a professional executive director and staff during 1996-98. Transitional spending in this process can be viewed as investment.

But AAEA's ongoing spending has risen, too. Logistics for services such as reviewing selected papers for the annual meetings (about 750 have been submitted for this summer's Chicago meetings) and for the awards program as well as all aspects of annual meeting planning, are now handled by the business office. We no longer have a secretary/treasurer, and the president and Executive Committee no longer devote as much of their time and institutional resources to details of AAEA business as once was the case. And, we have been able to start up and improve many member services - the AAEA Web site, an annually updated member directory, systematic meeting planning, more services in job search and information exchange, and more activities such as sections.

In the midst of the adjustment process, it has been difficult to get a good grip on the ongoing financial picture that will

emerge when the transition is complete. Only in the last year have we installed a CPA as chief financial officer who can mobilize the facts to provide a reliable informational platform for long-term planning. The work of the Finance Committee with the office, along with the completion of many transition tasks, has lifted the financial fog considerably.

One quite troubling conclusion has emerged: our current spending and revenues are not evolving to a sustainable steady state. Under a "status quo" budget, which essentially continues current

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#### **One quite troubling conclusion has emerged: our current spending and revenues are not evolving to a sustainable state.**

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spending activities and revenue sources under assumptions we regard as most likely, we project a \$250,000 budget deficit for 2001, and continuing deficits that would reduce our cash reserves from about \$1.6 million to \$700,000 over the next 5 years (and not long thereafter to zero).

This situation impelled the Board, at its Jan. 7, 2001 meeting, to take actions that will reduce our current and projected deficits. Some of them involve raising member dues and charges. Perhaps more controversial will be decisions the Board has made to cut spending. My primary

task in this note is to explain these cuts.

First, it should be noted that as the necessity to reduce spending activity became apparent during 2000, cost-reducing steps have already been taken in the business office. Travel and staff development has been cut back, one full-time position has been eliminated (leaving six), office space unneeded because of this and earlier staff reductions is being subleased, and other steps are being taken that will reduce business office expenses by an estimated \$60,000 in 2001. In addition, AAEA Board meetings have been reduced from 3 to 2 per year and AAEA coverage of Board expenses has been modestly reduced. However, the \$250,000 status quo deficit for 2001 remains *after* these economies have been made. Therefore, we have to resort to program cuts.

There are three main areas of cuts.

The first is in a set of activities that AAEA has funded, some for many years, that support our members' objectives through other organizations or ad hoc groups. These include the Consortium of Social Science Associations (COSSA), the Council of Professional Associations on Federal Statistics (COPAFS), the Council for Agricultural Science and Technology (CAST), and the Council on Food, Agriculture, and Resource Economics (C-FARE). For 2001 we are eliminating our funding for the first three. Support for C-FARE, which is more specifically an activity of agricultural economists, is being cut from approximately \$20,000 in

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## From the President

### Board examines options for AAEA's future



In a previous letter in the *Exchange*, I briefly discussed the elimination of some AAEA committees and the creation of new ones. The idea is to build the committee structure

based on specific operational activities of the Association, leaving the AAEA Board to focus on broad strategic and budgetary issues. An ad hoc committee on Governance and Priorities was charged to advise the Board on means of implementing this as well as aspects of the recently adopted AAEA Vision Statement, which can be summarized as a "big tent" view of our Association. That committee, under the leadership of Ron Knutson, has after an intensive process already come forth with two proposals.

The first proposal is to change the structure and membership of the AAEA Nominating Committee. That committee in recent years has consisted of nine members plus the past president as chair, appointed by the president. The proposal of the Governance and Priorities Committee is that the Nominating Committee be expanded to a total of 13, chaired by the past president. Under the proposal the committee will include one member from each of six sections and six at-large members. Sections will select their own representatives to the Nominating Committee. The at-large members will be appointed as under the current appointment process. The initial six sections represented on the Nominating Committee will be in the order they qualified and

were approved by the Executive Board. As new sections are formed, the section representation on the Nominating Committee would remain at six and be rotated among the sections. The at-large members will be appointed by the president-elect, two each year for three-year terms. All members of the Nominating Committee would be rotated with three-year staggered terms. Except for those currently serving out three-year terms, the initial length of term would be drawn by lottery. The Nominating Committee would be responsible for selecting the candidates to appear on the ballot for the Executive Board, including the president-elect and the Foundation Board. The members of each governing body would be elected at large as at present.

The Board has discussed this proposal, unanimously approved of the idea and will implement it for 2001-2002. If you have any comments on the proposal please let me, Donna Dunn, or any Board member know. We believe this is an excellent way of getting a broader range of people involved in this key aspect of AAEA governance and involving people who really want to serve.

The second proposal of the Priorities and Governance Committee is to form a Publications Council, which would take over the oversight functions of the Board with respect to the *AJAE*, *RAE* and *Choices*. These functions include periodic searches for new editors, approval of editorial advisory boards, publishing concerns and budgets, process and procedure for new publishing ideas, and hearing grievances and complaints that arise with respect to publications. It is proposed that members of the Publica-

tions Council be elected by the AAEA membership at large. Other details of the proposal have been sketched out by the Priorities and Governance Committee, and still others remain to be worked out, but the main ideas are as just outlined.

The Board has raised questions about some elements of this proposal. The budget aspect is especially sensitive because the Board has ultimate authority and legal responsibility when delegating details of budget authority (both spending and revenue) concerning journals. There is also a question whether it is best to elect the members of this Council through a general vote of the Membership (not done for any other committees). Nonetheless, the Board shares the general sense that the Board has at times become too involved in attempting to micro-manage the journals in the past. We want to be careful what we do here, because nothing is more important to us as a profession than preserving and enhancing the quality of our journals. They are the face and the substance we present to ourselves and the world, and will present long after we all personally have left the scene.

Again, comments on either proposal are welcome to Donna, to any Board member, or to me at [bruceg@arec.umd.edu](mailto:bruceg@arec.umd.edu).

Finally, note that elsewhere in this issue of the *Exchange* we announce the winners of our Essay Contest for the 21<sup>st</sup> Century. Congratulations to the winners and many thanks to all who entered and to the two review committees, one of which narrowed down the original 40 papers entered down to 16, and the second of which selected the winners from those 16.

Bruce Gardner



# the Exchange

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## From the President

### Business unusual: Items to consider at this year's membership meeting



This is the last *Exchange* column I will write as AAEA President, before Jean Kinsey takes over in August. I had intentions of bowing

out in some memorable way. I thought about a column composed entirely of jokes, but a colleague thought I'd been doing that all along. George Jones, as President of The (British) Agricultural Economics Society, presented his Presidential Address in (approximately) iambic pentameter, a *tour de force* which I commend to your attention (*Journal of Agricultural Economics*, September 1988, pp. 311-25). On re-reading it, it seems he not only introduced this medium of professional expression to agricultural economists but pushed it as far as it could possibly go, leaving nothing further to be accomplished in that vein. So, I have composed my swan song in the perhaps equally demanding medium of American vernacular prose and will stick to business.

Our annual meeting is looming on the horizon. I hope all members of AAEA are planning to attend. For the registration form and fees for categories of attendees, see the AAEA Web site, [www.aaea.org](http://www.aaea.org).

This would be a good year to attend the business meeting, which will be held at 8 a.m. on Tuesday, Aug. 7. There will be at least one substantive item requiring a vote: a motion, recommended by the Executive Board, to raise AAEA's dues from \$90 to \$100 for regular members, with similar increases for other membership categories, and beginning in 2004 a

biennial adjustment in dues equal to the larger of the increase in the Gross Domestic Product Deflator or 2.5 percent per annum. The exact wording of the motion is given on page 5 in this *Exchange*. This increase is strongly recommended by the Executive Board, for the reasons given in my January/February *Exchange* letter. A visual report from the AAEA Finance Committee can be found on the AAEA Web site at [www.aaea.org](http://www.aaea.org). But it is important for members to decide for themselves and vote accordingly on Aug. 7.

As readers of the *Exchange* will know, several other substantive issues in the governance of AAEA have been discussed intensively in 2001, most notably giving Sections a role in the Nominating Committee for AAEA officers. It is possible that one or more motions relating to this or other subjects in AAEA governance will be debated and/or voted upon at this year's business meeting. I cannot state the action items with certainty at this time because any member is free to bring a motion to the business meeting under the following terms, as

stated in the AAEA Constitution: "All resolutions pertaining to policy matters or involving appropriations of monies of the association presented from the floor at annual meetings of the association for approval must be submitted at least one full week in advance to the executive board."

Perhaps the most contentious aspect of recent discussion is a set of issues surrounding communication among members and between AAEA and the non-member audience of people interested in agricultural issues, broadly defined. This discussion has often focused on *Choices* magazine, as in the communication from Lyle Schertz in this issue of the *Exchange*, but the issues are more encompassing. I have appointed a Working Group on Member Communications, charged with providing "recommendations for means to best satisfy the demand for both member communication and outreach," as I reported in the January/February *Exchange*. They will be considering the issues that Lyle raises and others too.

Bruce Gardner



### Congratulations to Susan Offutt, New Association President-Elect

The Tellers Committee recently reported to President Bruce Gardner the results of the election of officers for the Association and Foundation for 2001-2004. The results are: President-elect: Susan Offutt, USDA-ERS; Directors: David Zilberman, University of California at Berkeley; Bill Boggess, Oregon State University; Foundation Directors: Roberta Cook, University of California at Davis; Alan Randall, The Ohio State University.





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# Exchange

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## From the President

### Time and change wait for no association



Consistent with the theme for this year's annual meeting in Long Beach (July 28-31) we are trying to "Move with the Speed of Change." The work of the AAEA Working Group on Communications

culminated at the spring meeting of the AAEA Executive Board meeting on April 19 and the formation of a new task force on AAEA's Name and External Image was announced.

Public and non-profit organizations typically do not make quick or bold decisions for change. Many diverse interests need to be accommodated. Many constituencies need to be heard. Many territories need to be protected. This is why we have representative boards, committees and task forces that listen, speak and act on our behalf. The Communications Working Group led by Dr. Robert King, University of Minnesota, did all of the above over the past year. With ycomen's effort, they met in Ames, Iowa (in December)! They debated, surveyed, talked with members, debated some more, and came to the Executive Board with a consensus opinion that AAEA and its communications efforts need to be user-driven. AAEA does not create information but it facilitates the exchange of ideas, research findings, and educational and employment opportunities by and for its members. AAEA provides channels for communication among members and outwards to students, policy makers and the interested public. It longs to be more effective at communicating with external audiences.

One of our primary communication channels is *Choices*. It was originally conceived as a vehicle in which to conduct a dialogue and communicate with external audiences. But, it turns out that the primary users are us, the members. Many professors

use it in their classrooms; some of its readers share it with colleagues and policy makers. In the member survey conducted by the Communications Working Group we learned that *Choices* is valued for its readability and variety of topics. "It is one way I can keep up with the breadth of interests and ideas of my colleagues" was a common idea expressed in the survey. The current and past editors of *Choices* ( Paul Barkley, Harry Ayer and Lyle Shertz) should be proud of the "brand equity" they have created in the name of *Choices*.

#### Decisions on CHOICES

It is, however, time to move *Choices* to the next level of effectiveness and broaden its exposure to the world. It (and we) needs to move into the "new economy" with faster, more efficient and lower cost distribution. Figuring out how to do this was both agonizing and exhilarating. Watching the release of creative juices was exhilarating as new ideas poured out. Preserving the valuable aspects of *Choices*, while moving it forward, was an agonizing discussion. With much debate, sensitivity and responsibility your Executive Board decided on a new path for *Choices*.

Starting in 2003, *Choices* will come to you on-line. The magazine will continue to receive and review manuscripts as always. Articles will be expertly edited and formatted, in a form that allows the full text (pictures and graphics) to be downloaded and printed out by anyone who wants to do so. Members will be notified by e-mail when new *Choices* articles are available. Members and nonmembers alike will be able to access articles through common search engines such as Google and we will be able to track the demand for each topic and article. This design makes possible an exciting new step towards much wider dissemination of our knowledge as it appears in *Choices*. This is the first step on a journey towards making *Choices* even more useful and valuable. It is a journey in which we will all participate. From among our

professional colleagues we will soon be calling for a new editor who will in turn, appoint his/her advisors and chart the future course towards an evermore timely and exciting communications tool. (See "The New *Choices*" on page 2 for details.)

#### Our Image?

What does an agricultural economist look like? What can he/she do for me? What kinds of jobs can I get if I study agricultural economics? We are always trying to answer these questions. Many of us believe that the answers are intuitively obvious. Some of us resent the questions; some of us answer with persuasive enthusiasm. With declining enrollments in many agricultural economics programs and in our association, we need to explore our image. What do those who could/should be members or clients of AAEA think we look like, do and contribute? Why might they choose to join us, reject us, applaud us?

Questions like these led to the appointment of a new Task Force on Name and External Image. They will be conducting a series of investigations into how other organizations have assessed their image, what the image of AAEA is, and whether or not the findings lead us to reconsider our name and service activities. You will undoubtedly have an opinion about this. We will want to hear from you. The members of this new task force are Steve Buccola (Chair), Rulon Pope, Kathy Segerson, George Hoffman, Jerry Fletcher, Laura Tichen, Jean Kinsey (Board representative) and Donna Dunn (ex officio).

#### See you in Long Beach!

You should have received your registration material for the meeting in Long Beach. We have an exciting roster of speakers, pre- and post-sessions, lunches, banquets, papers, posters and receptions in a great location. Register early. See you there!

Jean Kinsey  
jkinsey@aaea.org



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# Exchange

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## From the President

### Out-of-box thinking must happen by design, not default



Since this is the last President's column I will write before Susan Offut takes over as President of AAEA on July 30, I will tick off a few accomplishments over the past

year and then move on to the future. I am not known as one who likes to look backwards.

#### Current/Past Accomplishments

Implementing new governance opportunities for section members means that sections now nominate people to serve on the nominations committee making our ballots more representative of the whole membership.

Our Web site continues to grow and become more user friendly; e-mail notices from AAEA headquarters help keep us up to date. Deciding to move future articles in *Choices* on-line is part of the evolution of new communications. Future printed versions of *Choices* are not out of our sights, but for now, they are out of our budget.

Members responded marvelously to a call for more and better posters for the annual meetings. Likewise, members working in three subject areas that I added to the list of 15 subjects for soliciting selected papers responded with flair. Fourteen percent of the 766 selected papers submitted were from these topic areas; they represent 17 percent of the selected papers on the program in Long Beach. Our diverse membership and interests are blossoming with invitation

and opportunity; that makes me feel good about what we are doing and who we are.

Similar things might be said about the *AJAE*. This prestigious publication is one people seem to either love to bash or love to publish in. But significantly, I hear many comments to the effect that it is getting "better" from a readers point of view.

#### Future Vision

*Choices is here to stay!* I have written about the new *Choices* in the last issue of *Exchange* and in the editorial column of *Choices*. Here, let me reiterate that with the changes being made in 2003, *Choices* will retain its academic integrity with new editor(s) and reviewers, will broaden its availability, and will provide a format from which it can grow and become even more useful and valuable to both members and non-members.

#### Globalization of Agricultural Economics

AAEA is the "mother" of agricultural economics organizations all over the world. We were the first started in 1910 under the name of the American Farm Management Association which became the American Farm Economics Associa-

tion in 1914. For our 100th anniversary in 2010, we hope to involve several of our sister organizations from other countries and celebrate a century of agricultural economics associations.

The European Association of Agricultural Economists (EAAE) is holding its 10th Congress the end of August in Zaragoza, Spain. AAEA is participating at this Congress, holding a session that focuses on how donor countries can best foster growth and improved lifestyles in developing and transition economies and on our mutual interest in tracability of food products. I am moderating the session. Panelists are Joachim Von Braun, president of the International Association of Agricultural Economics [IAAE], Uma Lele from the World Bank and Brian Buhr from the University of Minnesota. AAEA's presence at the Congress signals a spirit of cooperation and mutual interest.

AAEA's cooperation in establishing *EuroChoices* resulted in a European counterpart to our publication. Harry Ayer continues to work with the Europeans on the venture. Of course, many of our members interact with international

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### Congratulations to Jon Brandt, New Association President-Elect



The Tellers Committee recently reported to President Jean Kinsey the results of the election of officers for the Association and Foundation for 2002-2005. The results are President-elect: John Brandt, North Carolina State University; Directors: Susan Capalbo, Montana State University; Harry Kaiser, Cornell University; Foundation Directors: Kathleen Segerson, University of Connecticut; Robert Hauser, University of Illinois.



# the Exchange

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## From the President

### When a name does matter: How ag economics ranks among other disciplines



In my first column as president, I would like to pick up where Jean Kinsey left off, and that is with the question of the name and image of the discipline called agricultural economics. Jean appointed a Task Force on Name and External Image to consider what the Association and the larger profession signify and to continue to evaluate what the Association can do to ensure the vibrant participation of the range of professionals who meet under the "big tent" of agricultural economics. It is well to undertake this task, certainly for the sake of the Association and its membership, but also because there is a larger context to be considered.

Most of us think of agricultural economics as a distinct sub-discipline of economics with a national presence. Students who receive graduate training in our academic departments are thought to be equipped to do research on a par with other social science disciplines. So it should be that rankings of research doctoral programs logically include departments of agricultural economics, many of which have acquired new names but are linked by their farm economics heritage. However, the most influential and prestigious of research doctoral program rankings, the one carried out by the National Academy of Sciences' National Research Council, has never included agricultural economics. In the most recent NRC rankings, done in 1995, only economics and econometrics were

considered. In fact, of all the agricultural sciences, only a few plant science sub-disciplines were included in the evaluation.

Now, the NRC proposes to conduct another research doctoral program ranking. It will begin with a re-consideration of its 1995 methodology, which relied largely on reputational factors in creating rankings of university departments. And, it is explicitly considering the inclusion of agricultural sciences, including agricultural economics.

We need to pay attention to this process because these rankings can have enormous significance. These assessments have been used to expand, contract, or merge programs, to influence students' decisions about where to enroll in graduate school, to support state government budget allocations to higher education, to justify university hiring decisions, and to guide attempts to improve graduate education. While the specifics differ from campus to campus, all colleges of agriculture and agricultural economics departments find themselves at the nexus of change. Advances in biological science are transforming plant and animal science disciplines. The growing importance of agribusiness has great impact on many agricultural economics departments.

Among other aspects of ranking methodology, the new NRC panel will examine the taxonomies that have been used in past studies. The subgroup looking at taxonomies will develop criteria to include/exclude fields, determine ways to recognize sub-fields within major fields, and determine issues that are specific to

broad fields: agricultural sciences, biological sciences, arts and humanities, social and behavioral sciences, physical sciences and mathematics, and engineering. It is not at all obvious where agricultural economics would fit in an NRC taxonomy (under agricultural or social science) or if it would fit at all. In 1995, there were no separate rankings for sub-disciplines of economics, such as labor economics or macroeconomics.

This NRC committee began its work this summer. It is chaired by Jeremiah Ostriker, a Princeton astronomer, and has one college of agriculture dean, Elton Aberle from Wisconsin-Madison, among its membership. Thanks to a push from the Economic Research Service, USDA's Research, Education, and Economics agencies are sponsors of the committee's work, thereby promoting the views of agricultural sciences as the committee pursues its agenda. More about the membership and charge of the study, as well as progress reports, can be found at [www.nas.edu](http://www.nas.edu) at the "current projects" tab, just enter "research doctoral programs" in the search field. The 1995 report *Research Doctoral Programs in the United States: Continuity and Change* was published by the National Academy Press, find it at [www.nap.edu/catalog/4915.html](http://www.nap.edu/catalog/4915.html). Next summer at the AAEA meetings in Montreal, watch for a session that will relate the work of this important NRC panel to the interests and concerns of Association members.

Susan Offutt

the

## Exchange

The newsletter of the American Agricultural Economics Association

30 ABR. 2003

## From the President

## 'Introducing ourselves' first step in researching ag economics career market



As a professional society, we have not devoted much attention to the systematic collection of data about the market for agricultural economists. The titles of Ph.D. dissertations granted are published each year, and some years the department heads gather information on faculty salaries (and keep the results mainly to themselves!). Other than the occasional survey by CWAE and/or graduate students, we have built only a small knowledge base to support members' inquiries about job prospects and rewards in the field, about similarities and differences in career paths depending upon employment in academe, government or industry, and so on. As a complement to the work now underway by the AAEA task force looking to our external image, we should also, to paraphrase Austin Powers, "allow ourselves to introduce ourselves."

Of course, before data are collected, it is appropriate to define the questions to be asked. So, I turned to the literature on labor markets for professionals to get an idea of what kinds of analyses might be useful and relevant for agricultural economists. The first thing I learned is that the labor market most often analyzed by economists is that of professional sports. Baseball is way out front in terms of numbers of studies, but most pro sports have been considered. In particular, and of interest with the start of the season this month, the pro hockey experience has been fairly extensively studied in such

works as "Ethnicity, Productivity, and Salary: Player Compensation and Discrimination in the National Hockey League," in the May 1999 *Applied Economics*. One might speculate about the gender bias in the economics profession that leads to a fixation on pro sports. However, it must fairly be said that pro sports teams are good subjects for empirical study, with players' salaries known publicly and performance and outcomes relatively straightforward to measure (my favorite is the dummy variable for "goons" in the NHL study). With other professions, the picture is not so clear.

While it is more fun to consider how free agency has affected major league salaries, it is more relevant to consider the market for economists. An important recent work is by John Siegfried and Wendy Stock on "The Labor Market for New Ph.D. Economists," published in the Summer 1999 *Journal of Economic Perspectives*. Siegfried and Stock find that a growing proportion of new economists start their careers in business or industry, that an international market for new economics Ph.D. is evolving, and that economists do as well or better than new Ph.D.s in other disciplines. The underlying data come from a special survey of economics (but not ag economics) graduate students that was used in conjunction with the annual National Science Foundation survey of earned doctorates. This work could provide a template for a comprehensive graduate student survey and analysis of the ag economics market for new Ph.D.s.

Another fairly recent study looks at the supply side of the economics (but not ag

economics) Ph.D. market, "Market Structure in the Production of Economics Ph.D.'s." Frank A. Scott, Jr. and Jeffrey D. Anstine, writing in the July 1997 *Southern Economic Journal*, find a mature industry, annual output stable since the early 1970s, with individual department size changing little, and the leading departments' market shares steady, as well. They do find that the dominant program size is and has been an annual output in single digits, suggesting the absence of strong economies of scale in the production of new Ph.D.s. They also speculate that this market structure might change if the number of students were to decline, a situation both economics and ag economics may be facing in the years ahead. These are not the only examples of ways that economists can analyze markets to provide insights valuable both to those seeking jobs and to those supplying them.

I propose that the AAEA collect data on key aspects of the market for agricultural economists on a continuing basis, encourage the analysis of such data, and provide an easily-accessible clearinghouse or inventory of data and analyses on all aspects of the markets and institutions for agricultural economists. The value of individual efforts might be enhanced through systematic attention by the professional society. How to proceed? For starters, I'd be interested in hearing about relevant projects underway or recently completed. And, I'd appreciate volunteers for the (inevitable?) task force I will appoint to see to the feasibility of what I have proposed.

Susan Offutt

# FEEDSTUFFS

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

## Federal agencies take new measures to protect food supply, boost meat inspection

By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — With the U.S. at war and operating under a high terrorism alert, two federal agencies last week announced new measures aimed at strengthening protection of the nation's food supply from any potential terrorist attack and bolstering the nation's meat inspection system.

Top officials from both agencies laid out their plans in keynote speeches at the annual Food Safety Summit in Washington before a large audience from the food processing and marketing industries.

The new actions came as federal agencies launched "Operation Liberty Shield," an interagency effort to forestall terrorism threats in the wake of the

war in Iraq.

Agriculture Secretary Ann Veneman said she was considering asking for new Congressional authority to strengthen the U.S. Department of Agriculture's meat inspection system. While consumer groups have sought similar food safety changes in the past, the agency maintained they were unneeded.

In a reversal, Veneman said, "Right now, we are working under a meat inspection act that pre-dates the Model T."

Interestingly, her remarks came just as the General Accounting Office (GAO) released a report recommending that both USDA and the Department of Health & Human Services review their existing statutes to identify additional authorities needed for food security,

The GAO report recommended both increased statutory authorities and advanced training for agency personnel to address terrorist threats. Neither agency "believes that it has the authority to regulate all aspects of security at food-processing facilities," GAO said.

While its recommendations were aimed at food security issues, the changes Veneman is considering would also strengthen USDA's day-to-day oversight of food safety issues in meatpacking plants. She said the agency is considering actions such as mandatory notification to USDA when a federal establishment has reason to believe that meat or poultry has been adulterated or misbranded. ("Adulterated" can mean pathogens such as *Escherichia coli*, *Listeria*  
*Inspection/ p. 4*

## WTO releases update on reform proposal

By IAN ELLIOTT

Feedstuffs Correspondent

Last Tuesday, the World Trade Organization released an update to last month's framework on the reform of agricultural trade rules, saying that the entrenched positions by governments has made it difficult to make much more than minor changes in the February text.

Governments around the world quickly criticized the updated text drafted by Stuart Harbinson, chairman of the WTO agriculture negotiations. Some governments, like Australia and the U.S., said the framework still lacked

the needed ambition. Others, such as the European Union, South Korea and Japan, said that the new text would not move countries closer together.

The text follows the last round of negotiations in Geneva, Switzerland. Harbinson said countries during that session at the end of February did not provide WTO with enough direction to make meaningful changes in the proposed framework.

"A number of participants indicated that the draft did not correspond in various ways with their vision of the mo-  
*Proposal/ p. 27*

## Large-scale changes seen in wheat trade

By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — The past 12-18 months have brought profound changes in the world's wheat trade that may spell long-term challenges for the five countries that have dominated world trade in recent years.

The reemergence of eastern Europe and Russia as powerhouse producers and recent good crops in India and Pakistan have allowed production from those areas to take a big bite out of the

market share that the European Union, the U.S., Canada, Australia and Argentina depended upon until the past two years.

U.S. Wheat Associates vice president Paul Dickerson reported that at the end of 2002, wheat exports from the new players in the world wheat market had increased their market share "from 9 to 32% in just two years." Dickerson analyzed the trend at a joint meeting of wheat industry organizations in Wash-  
*Wheat/ p. 4*

## Less production to help improve hog market 'view'

By ROD SMITH

Feedstuffs Staff Editor

ST. PAUL, MINN. — The chicken markets declined 2 cents last week as consumer demand slowed across both the foodservice and retail sectors, and the egg and turkey markets generally held steady, with eggs starting their Easter run and turkeys continuing to trade into Thanksgiving, according to Feedstuffs sources contacted from the annual meeting of the Midwest Poultry Federation in St. Paul.

The cattle markets traded \$1-2 higher last week, with demand for beef improving and demand for cattle strengthening over the week. The hog markets also traded higher as hams picked up demand for Easter features and hog slaughter came in on year-ago levels, although still high and higher than expected off the December report.

The best news of last week was what will be the big news this week in that expectations for the hogs and pigs report that were dispatched into the markets show a hog situation that producers, after almost 18 months of losses, should begin returning to profitability in the next 4-6 weeks and operate above the line for at least the next three quarters and probably longer. "It's a different view from up there (above the line)," one producer said.

The chicken markets were soft across the chicken complex, with demand seasonally slow and supplies sufficient to needs, sources said. A distributor suggested that consumers were staying home and watching coverage of the war on television, although a cocoon effect wasn't as evident in the meat complex.

Chickens delivered into the eastern markets at 51-54 cents/lb. last Thurs-  
*Chicken/ p. 10*

### Inside News

#### Appeals considered

Appeals of the constitutionality of the national beef and pork programs are under consideration in the circuit courts, for the beef program in the eight circuit and for the pork program in the sixth circuit. Page 4.

#### High trade policy marks

Canada was given high marks for having one of the world's most transparent and liberal trade regimes in a recent WTO analysis of its trade policy, even though the Canadian government uses tariff rate quotas to restrict imports in a few sectors like agriculture. Page 5.

#### Efficiency important for U.S. pork to China

Every second a terminal can save shippers and every second a logistics center can save distributors adds competitive efficiency for getting U.S. pork to China from Iowa. Page 8.

#### Identification benefits may outweigh costs

The individual profitability of pigs and sow production is just one of the items that may justify the cost of individually identifying hogs from birth to the grocery store, a speaker told attendees to the annual meeting of the American Association of Swine Veterinarians. Page 17.

### Business

#### American Securities invests in Ag services

Ag Services of America Inc. and American Securities Capital Partners LP announced the signing of a definitive agreement providing for an investment of up to \$70 million in Ag Services by American Securities. Page 6.

#### Embrex breaks ground

Embrex Inc. has broken ground to build a biological manufacturing plant in Laurinburg, N.C., that will produce the company's Inovocox coccidiosis vaccine for poultry that is presently under review by USDA. Page 7.

### Swine Nutrition & Health

#### Measures of sow

#### longevity compared

Researchers at the University of Minnesota have compared different measures at the farm level to improve sow longevity, saying the choice of retaining or culling must be based on individual sow characteristics. Page 9.

### Markets

#### Grain, oilseed markets seem unfazed by war

Markets remained fairly quiet last week as feed grain and oilseed markets remained stagnant despite the beginning of war with Iraq. Page 25.

#### Good hogs report seen

The hogs and pigs report next week should show slaughter starting next  
*Hog/ p. 10*

# FEEDSTUFFS

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

www.feedstuffs.com

Inside News

**Tyson not guilty**  
In an important ruling, jurors last week found Tyson Foods Inc. not guilty of conspiring to bring illegal immigrants into the U.S. and employ them at its poultry processing plants. **Page 3.**

**Export system faulted**  
European Union auditors faulted the bloc's export subsidy system for agricultural products last Wednesday, saying its current multi-million euro prefinancing regime needs to be reviewed and perhaps scrapped. **Page 3.**

**Action needed in dioxin cases**  
Given several recent incidents of dioxins in animal feeds, FDA deputy commissioner Les Crawford last week called for a joint industry-government effort to address the situation. **Page 4.**

**Report released**  
A new report from the National Academies of Sciences calls for a ban on the use of antimicrobials for growth promotion in food animals if those classes of antimicrobials are also used in humans. **Page 4.**

**WTO talks may slow**  
In two interviews with European newspapers recently, WTO Director General Supachai Panitchpakdi warned that the war in Iraq may slow trade negotiations. **Page 5.**

Business

**Willmar Poultry markets new vaccines**  
Willmar Poultry Co. has established a new subsidiary to manufacture and market vaccines produced through a novel technology that includes the company's first livestock vaccines. **Page 6.**

**Embrex receives patents**  
Embrex Inc. has reported the award of two patents for *in ovo* determination of a bird's gender, the first for a method of detecting elevated levels of sex-related hormones and the second for a method of pooling the allantoic fluid. **Page 7.**

**Equine Nutrition & Health**  
**Balanced nutrition key for the equine foot**  
Balanced nutrients supplied in adequate amounts to the horse contribute toward building the hoof from the inside out at a cellular level. **Page 10.**

Markets

**Corn, wheat dip ahead of big report**  
Soybean futures moved slightly higher while corn and wheat dipped as the grain trade waited in anticipation of the USDA's Prospective Plantings report due out March 31. **Page 25.**

**Cattle prices steady**  
Cattle markets were steady to fraction-

## Humanitarian aid, food assistance front-burner issue in Washington

By SALLY SCHUFF  
Feedstuffs Washington Editor

WASHINGTON, D.C. — Humanitarian and food assistance to Iraq is a front-burner issue in Washington — even as political wrangling continues in the United Nations' Security Council on restarting the U.N.'s oil for food program.

U.S. Agency for International Development (USAID) administrator Andrew Natsios said March 25 the agency has teams in place in the region to deal with war-related humanitarian and reconstruction work.

However, during the first week of the war, World Food Program (WFP) spokesperson Khaled Mansour, speaking in Amman, Jordan, said the agency "is gearing up for potentially the larg-

est humanitarian operation in its history."

WFP planners believe 2.1 million people may require assistance during the opening weeks of the war, but within four to six weeks. "WFP may be called upon to sustain the monthly food rationing system in Iraq," Mansour said March 20.

"With possibly the entire population of Iraq requiring food aid, the full operation could cost over \$1 billion," he told reporters during a press briefing.

Disruption in Iraq's oil for food program, established 12 years ago at the end of the first Gulf War, has 60% of the Iraqi people dependent on rations from that program. (Iraq's population is 27 million.)

WFP operates a nutrition program

under the oil for food program in three northern provinces of the country on behalf of the Iraqi government. Kurds in northern Iraq have "built a robust market economy, and their agricultural system allows them to export," Natsios reported.

The "real poverty is in the south in the Shiite area near Iraq's borders with Iran, Kuwait and Saudi Arabia," he said. "They were vulnerable prior to the beginning of the conflict." In those southern and central areas where the Iraqi government has operated the oil for food program, "warehouses are almost empty," Mansour said.

Humanitarian efforts will be hampered by the lack of existing infrastructure, Natsios said during a Washington *Assistance!* p. 5

## Little progress made as WTO deadline looms

By IAN ELLIOTT  
Feedstuffs Correspondent

With a critical March 31 deadline looming, negotiators from 145 countries were cloistered behind closed doors in Geneva, Switzerland, last week trying to find the key to an elusive compromise on how to cut agricultural tariffs and subsidies.

The talks opened March 25 and continued for two days in small groups focused on specific issues like export credits, food aid and how to administer tariff rate quotas (TRQs). Last Friday, negotiators planned to meet as a group, with talks expected to continue through the weekend into March 31.

The talks are the last chance negotiators will have to reach a consensus on a modalities framework for cutting import tariffs and farm subsidies before the deadline. By last Thursday, it was obvious that the needed consensus was rapidly slipping away from negotiators. By that point, major agricultural trading nations were starting to downplay the significance of the deadline.

Under the negotiating schedule agreed in November 2001 when the Doha Round was launched, by March 31, negotiators were to have "established" the modalities for cutting subsidies and tariffs. As the week progressed, it appeared increasingly possible that a text would appear March 31 laying out the modalities but that the text would be issued by Stuart Harbinson, chairman of the World Trade Organization agriculture negotiations, on his own responsibility.

**Repeat of Uruguay Round**  
That is the same device governments used in the last global trade talks, the Uruguay Round, to advance negotiations.

## Dairy program, checkoff ruled to be constitutional

By ROD SMITH  
Feedstuffs Staff Editor

A district judge concluded last week that the national dairy program is constitutional and that the mandatory checkoff on milk producers is legal and may be continued.

His finding means that the national agriculture commodity promotion programs are on an uncertain course toward the U.S. Supreme Court, as lower courts have ruled that the programs are both constitutional and unconstitutional and with two cases now being considered in the appellate courts.

The programs use checkoffs to collect fees from producers to conduct generic promotions for dairy products, beef, pork and other commodities and to conduct research, consumer information and producer education. The checkoffs are mandatory.

The programs are established through congressional legislation to provide for industry and market stability and are managed by producer boards through U.S. Department of Agriculture oversight.

The programs are opposed by producer *Constitutional!* p. 4

## Veterinarians 'ideally suited' to handle food safety issues

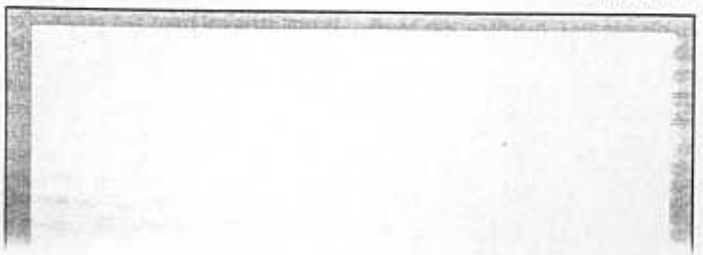
By MICHAEL HOWIE  
Feedstuffs Managing Editor

ORLANDO, FLA. — Veterinarians should seek continuing education opportunities outside of "normal veterinary programs" in order to better understand core food safety issues encountered in the food industry because the food industry will increasingly require controls on raw materials back to the farm level in order to ensure food safety, quality and consumer satisfaction, said Dr. Scott Brooks to attendees of the

American Association of Swine Veterinarians annual meeting in Orlando.

Brooks, a veterinarian with Yum! Brands Inc., said veterinarians are "ideally suited" to fill the role of broadly trained and experienced scientific professionals to deal with current and emerging food safety challenges. As part of the skills a veterinarian possesses, he said, there must be an understanding of the potential for human impacts of actions on the farm or at the

*Issues!* p. 19



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A BIMONTHLY JOURNAL OF RESEARCH AND TECHNICAL PROGRESS

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## Resultados de explotaciones de vacuno de carne en la comarca del Maestrazgo

Esta publicación aporta algunos datos sobre las magnitudes técnico-económicas de explotaciones ganaderas de bovino de carne de la comarca del Maestrazgo. Los datos se tomaron mediante encuestas en 12 explotaciones de nueve municipios. Después de depurar los datos se presentan los resultados medios anuales de 9 explotaciones de los años 1998, 1999, 2000 y 2001, situadas en los siguientes municipios: Cantavieja (1 explotación), Cañada de Benatanduz (3), Fortanete (2), Gúdar (1) y Villarluego (1).

En el documento «Estudio y valoración de los usos del suelo en los municipios de las Serranías de Gúdar-Maestrazgo» (Flores, 2001), se describe la evolución del sistema agropecuario de la comarca citada y aporta información técnica detallada y actual. Los datos que presentamos sobre explotaciones de bovino de carne pueden completar, en el aspecto económico, la abundante información de ese documento.

La comarca del Maestrazgo es una de las más deprimidas de Aragón, tanto en términos demográficos —es la comarca menos poblada, con una densidad de población de 2,8 habitantes por km<sup>2</sup>—, como en términos económicos.

La elevada altitud (entre 1.000 y 1.800 m), con la consecuente rigurosidad del clima, la carencia de comunicaciones, servicios y la dependencia exclusiva del sector agrario ha contribuido a la disminución paulatina de la población y a su envejecimiento.



El modo tradicional de explotación agraria se ha caracterizado por la existencia de masías diseminadas por el territorio basadas en un tipo de explotación mixta: ganadera, agrícola y forestal. Este sistema de explotación ha ido variando, resultando una separación de la actividad ganadera de la agraria, siendo predominante en la actualidad la ganadera sobre la agrícola.





# INFORMACIONES TECNICAS

Dirección General de Tecnología Agraria

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Centro de Técnicas Agrarias

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## Cultivo de tomate para industria Resultados de los ensayos. Campaña 2002

Es difícil hablar de un cultivo en el que hayan coincidido en los últimos diez años tantos y tan rápidos cambios como en el cultivo de tomate de industria.

Estos han sido debidos no solamente a la vertiginosa innovación tecnológica en todos los aspectos relacionados con la actividad agronómica y técnica sino que estos mismos han influido en aspectos puramente sociales del cultivo y en el que se ha producido una desaparición evidente de la actividad hortícola familiar de las explotaciones agrarias.

Favorecida por la bajada de precios y la desaparición de las ayudas destinadas a las industrias conserveras han hecho que se aumente de una manera importante las superficies medias por explotación, paralelamente a la mecanización integral del cultivo.

Las grandes inversiones económicas que se han realizado por parte de los empresarios cultivadores de tomate han sido lo suficientemente elevadas como para mantener en sus explotaciones el cultivo y ha sido la mecanización de la cosecha la que ha cobrado mayor importancia en estos dos últimos años con el consiguiente aumento del parque de maquinaria y de la disminución de la mano de obra en las labores del cultivo.

El aumento de la superficie de riego por goteo ha seguido la misma pauta que la mecanización del cultivo. La superficie total de Aragón se puede considerar en un 70-75% controlada por esta técnica y en muchos casos acompañada por la utilización de acolchados plásticos, por no decir en su totalidad.

De este último aspecto y de la aparición de films de plástico biodegradable en el cultivo hablaremos en esta información. Los problemas medioambientales que ocasiona el uso de estos acolchados hace que se presenten posibles alternativas a su uso, fundamentadas por los trabajos que se están llevando a cabo en distintas regiones de España.





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« Le partenariat est au cœur de notre mission »

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## « Qualité ou qualités ? »

La prise en compte de la qualité vise deux objectifs principaux : donner de la valeur ajoutée aux produits et fidéliser le consommateur en lui offrant une garantie accrue.

Ces deux aspects fondamentaux mettent en jeu les travaux relatifs aux outils de mesure de la qualité et aux techniques d'évaluation sensorielle.

Mais la notion de qualité est tout à la fois complexe et multiple et pour en assurer la maîtrise, il est nécessaire d'en définir non seulement les critères mais aussi les niveaux d'appréciation.

Ainsi, ce travail va :

- de l'élimination de la non-qualité, cette dernière correspondant à des critères de rejet par les consommateurs (fermeté excessive, taux de sucre insuffisant...), Elle est pilotée par la maîtrise des itinéraires techniques depuis le champ jusqu'au magasin ;
- à la mise à disposition prochaine d'un outil de mesure prédictive de la qualité, afin de distinguer les niveaux gustatifs d'un produit.

Les travaux d'expérimentation concernent également la caractérisation organoleptique des produits. Par exemple, l'établissement de critères permettant de distinguer les différents types de melon charentais présents sur le marché ou encore la description sensorielle de différents types de salades, tomates ou variétés d'abricot. Cette « signature » gustative pourra être utilisée par les professionnels pour mieux guider le consommateur dans ses choix. Enfin, les tests de nouveaux outils non destructifs, (proche infra-rouge, détecteur acoustique...) destinés au tri en ligne, permettront, compte tenu d'une mesure réalisée fruit par fruit, de fiabiliser l'identification qualitative des lots.

Sur ces différents thèmes, le Ctifl fournit *in fine* des référentiels et des outils pour toute la filière. ■

Danièle Scandella

Responsable de l'antenne de Rungis

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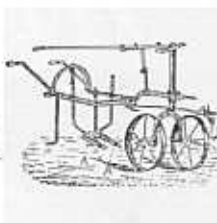
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José Luis Ponce de León.

**Director de la Estación de Mecánica Agrícola.**  
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PAISAJE PROTEGIDO DE LOS PINARES DE ROBINO



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## SAS Patrocina los Juegos Mundiales de Verano Special Olympics

Un año más, **SAS** patrocinará los Special Olympics de Verano que, este año 2003, se celebrarán en Irlanda el próximo mes de junio. **SAS** entiende que mediante la acción social, las empresas son una fuente de recursos más para las organizaciones sociales, a la vez que colaboran activamente con la sociedad. Y, el ejemplo más palpable es la experiencia vivida con **Special Olympics**, organización no gubernamental de carácter internacional, cuyo objetivo es fomentar la competición deportiva entre los jóvenes discapacitados psíquicos con el propósito de proporcionarles posibilidades de integración social y desarrollo profesional.

(Continúa en la página 2)



Este año el evento de Business Intelligence con más repercusión en el ámbito europeo, el **Congreso de Usuarios Europeos de SAS, SeUGI 21**, se celebrará durante los días **17, 18 y 19 de junio en Viena**. En SeUGI 2003 se concentrarán más de 3.000 profesionales que podrán compartir sus experiencias en la creación de inteligencia empresarial.

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### CRM Analítico en Repsol YPF: optimización de la relación con los clientes


 REPOL  
YPF

El **Grupo Repsol YPF** es una empresa multinacional líder en España y Argentina, que compete en los sectores de energía y petroquímica. Las actividades del grupo se organizan en tres áreas estratégicas: Upstream (exploración y producción), Downstream (Refino, Marketing, GLP y química) y Gas y Electricidad.

Dentro de la Vicepresidencia de Downstream, **Ignacio Sanjuán Sánchez - Sarachaga, Subdirector de Servicios Comerciales de Refino & Marketing**, coordina un equipo que responde a la necesidad de conocimiento del cliente que se genera dentro del área de Refino-Marketing.

(Continúa en la página 4)

### Caja Madrid, una apuesta decidida por CRM


 CAJA MADRID

**Caja Madrid** es la entidad decana del sistema financiero español. Fundada en 1702 por el sacerdote aragonés Francisco Piquer, esta Entidad es hoy uno de los grupos con mayor solvencia y capacidad de crecimiento, productividad y rentabilidad.

Con 5,8 millones de clientes, de los cuales 2,2 millones son usuarios de ATM y 3,2 millones utilizan regularmente los nuevos canales de acceso (teléfono, internet, televisión interactiva y WAP), **Caja Madrid** se ha consolidado como el cuarto grupo financiero y la cuarta entidad del sistema financiero español por activos totales, créditos y recursos de clientes.

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# REVISTA ARGENTINA DE PRODUCCION ANIMAL

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# TRANSmarket

Informe confidencial de transporte y logística

Número 19

Del 16 al 30 de ABRIL de 2003

30 ABR. 2003

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## Face à l'avalanche

Les dernières statistiques rassemblées par Michel Courvoisier sont implacables et doivent nous alerter tous : les importations de truffes "asiatiques" ont atteint et dépassé de beaucoup le niveau qui nous avait tous conduits à réagir une première fois dans les années 1994-1995.

Ce ne sont pas 20 à 25 tonnes de truffes venues de Chine qui arrivent désormais en France, mais de 30 à 35, soit autant que la production nationale.

Sans doute, ne s'agit-il pas de la même espèce. Mais avec ce volume, il n'est plus possible de considérer que ces importations ne seraient pas une concurrence pour les truffes européennes de qualité : nous observons cette année un effet de substitution et d'éviction. Les consommateurs – trop souvent ignorants – achètent ce qui est d'abord pour eux de la truffe. Leur déception devant le manque de saveur de *Tuber indicum* ou de *Tuber himalayense* les détourne ensuite des truffes noires européennes, d'une toute autre qualité. Comme pour les monnaies, la truffe médiocre chasse la bonne.

Indirectement, les importations peuvent aussi peser sur les prix payés aux producteurs européens. On l'a sans doute aussi perçu cette année.

Bien sûr, les récoltes des hivers 2001 et 2002 ont été marquées par des conditions épouvantables avec le gel de l'an passé qui suivait une année médiocre. Mais la climatologie ne saurait tout expliquer, ni justifier un tel niveau d'importations.

Il est urgent que se mette en place l'initiative communautaire que les producteurs européens appellent de leurs vœux pour relancer durablement la trufficulture européenne afin que le niveau de la production se rapproche de celui de la demande.

D'ici là, en attendant l'effet des mesures, il faut – comme cela se fait pour beaucoup de produits – que les autorités européennes prennent les mesures appropriées pour limiter l'avalanche des truffes asiatiques si l'on ne veut pas que la trufficulture européenne ne disparaisse, ou que les truffes d'origine asiatique croissent et se multiplient sur nos propres terroirs.



Jean-Charles SAVIGNAC,  
président de la FFT

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## Dans notre prochain numéro :

- Bilan de l'expérimentation en 2002
- Suite de l'hommage à M. Jalade



## En marcha la fundación Valle del Ebro

Plinio, junto con otros historiadores antiguos, afirmó que probablemente el río Ebro dio el nombre a toda la península, tal era su importancia.

Existen datos que corroboran que desde el siglo IV a. C. y dada la navegabilidad del río desde Logroño hasta su desembocadura, existía un flujo de embarcaciones que comerciaban con los habitantes de las riberas de forma habitual y probablemente introdujeron el cultivo de la vid y el olivo.

Permítanme esta licencia de relatar dos datos de nuestra historia, sin mayor pretensión que resaltar la evidente importancia desde épocas antiquísimas, de nuestro río Ebro y, por extensión, de las tierras de su valle.

En la ciudad de Calahorra, hace nueve meses se inició un proyecto que, después de muchas sesiones de trabajo fructificó el pasado 14 de febrero con la creación de la Fundación "Valle del Ebro", constituida por las Confederaciones Empresariales de Aragón, Navarra, La Rioja y por las Cámaras de Comercio de las tres Comunidades.

Su existencia obedece a la necesidad de disponer de una herramienta que nos permita avanzar en el desarrollo socioeconómico de las tres autonomías de una forma conjunta y con una perspectiva empresarial.

Aragón ocupará la Presidencia de la Fundación, durante los dos próximos años, representado por el presidente de la GREA, Julián López Babier, quien además ha sido impulsor de la idea. La Secretaría General estará representada por mí, como presidente de la AIAA.

Esta idea no supone una novedad; ya se había intentado desarrollarla en anteriores ocasiones, pero por distintas circunstancias no fue posible.

Se ha decidido que fuese el sector agroalimentario el que sirviera como lanzadera de este proyecto y no es casual. El sector agroalimentario representa un valor muy importante en las

tres comunidades, tiene profundas raíces, una muy buena imagen entre los consumidores y, lo más importante, posibilidades reales de expansión y crecimiento por delante de muchos otros sectores.

Los primeros pasos ya han ido tomando forma y se han materializado en varias acciones:

- **Registro de la marca "Valle del Ebro".** Este nombre está pensado como una marca comercial que se incorpore a los envases de los alimentos, independientemente de cualquier reconocimiento de calidad que puedan tener. Es compatible y estará diferenciado de distinciones como Denominaciones de Origen, Especialidades Tradicionales, Marcas de Calidad...
- **Registro del dominio en internet de "Valle del Ebro"** Se está preparando ahora la página web.
- **Master de dirección de empresas agroalimentarias.** Será impartido desde el próximo curso académico por las universidades públicas de La Rioja, Navarra y Zaragoza, que otorgarán una titulación conjunta.
- **Feria Profesional.** Se celebrará una Feria Internacional entre las tres Cámaras de Comercio, similar a Alimentaria.



Firmantes de la fundación "Valle del Ebro" en Calahorra

Foto: FABIAN SIMÓN

- **Acuerdo de constitución de una empresa de comercialización.** Servirá para "vender" los alimentos que estén acogidos a la marca comercial "Valle del Ebro" y tendrá un ámbito de actuación nacional e internacional.

Estas son las primeras acciones que se han preparado, pero es a partir de ahora cuando se verá el acierto o fracaso de esta idea.

Se van a efectuar presentaciones en las tres Comunidades Autónomas para explicar en que consiste este proyecto, cuales son las ventajas de participar, la importancia de obtener un mayor valor añadido apoyándonos en la marca "Valle del Ebro". En resumen para captar la atención de los empresarios y eliminar dudas y posibles recelos.

Hemos creado el embrión de una herramienta que pretende ser útil para ayudarnos en el desarrollo de nuestras empresas en un aspecto en que nos declaramos deficitarios: la comercialización de nuestros productos. Nuestra intención es unir esfuerzos, aprovechar sinergias, nunca dividir.

Carlos Campillo. Presidente de AIAA





# Agra Europe

weekly

08 MAYO 2003

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May 2, 2003

## Highlights

- New impetus to get CAP reform deal
- EU clamps down on Balkan sugar fraud
- First EU-25 budget figures proposed
- Milk producers to lose out from MTR
- Sugar reform and producer monopolies
- IGC scales down world wheat forecast
- Avian flu continues to rack Netherlands



## High-level group set to look at CAP reform

A 'high-level group' consisting of very senior figures from member states' agriculture ministries is to add its intellectual weight to efforts at reaching a deal on CAP reform as soon as possible.

Ending weeks of speculation, a Greek Presidency proposal to this effect was passed by diplomats in Brussels this week as a ticking clock brings ever closer the 'deadline' of the end of June - the point by which the European Commission and member states generally hope to bring the debate on CAP reform to a close.

The group - which is similar to one which was set up in the final stages of the Agenda 2000 negotiations - will hold meetings above and beyond those which are already taking place between farm ministers and, lower down the chain, between diplomats in the Special Committee on Agriculture (SCA).

It is not yet known, however, when it will first assemble, or how often thereafter. The group will report directly to agriculture ministers.

### Length of mandate

One point of contention is the length of time for which the group should operate - largely because whatever date is set for this will lay

down another marker as to when ministerial discussions are expected to conclude.

A source told *Agra Europe* that Germany, the Netherlands and the UK had pushed to set out a mandate for the group reaching no further than the end of June.

"This gives a strong signal that they want to achieve reform by then," he said.

### Backing for partial decoupling

Other member states have been less keen on the idea - perhaps signalling suspicion that discussions on the reform package may well drag on past mid-summer.

The Commission is especially anxious to tie up the CAP reform package before the end of the Greek Presidency on June 30, as this will represent effectively the last chance to change the EU's farm subsidy programme before the crunch WTO ministerial meeting in Cancun on September 10-14.

With just eight weeks to go until the end of June - during which period three meetings of farm ministers are scheduled (two *(Continued on page EP/2)*)

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08 MAYO 2003

AMERICAN FRUIT GROWER® April 2003 • Vol. 123 No. 4

## features



The International Dwarf Fruit Tree Association (IDFTA) has had an active start to 2003, first with its South American Tour, and then with its annual conference in Syracuse, NY. In this series of articles, we take a close look at these events.

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## Información nacional



Se derogan las distancias mínimas entre las explotaciones y mataderos; Agricultura: entra en vigor el Real Decreto sobre requisitos agroambientales; El Gobierno aprueba la regulación de operadores en el sector oleícola; El Ministerio y el sector estudian medidas para evitar fraudes en la entrada de ajos; Récord de exportación de aceite de oliva; Agricultura ecológica: la superficie española creció el 37% en 2002.

## Información de la UE



Los precios agrícolas cayeron un 4% en la UE y un 5% en España en 2002; Etiquetado de carne: entran en vigor normas más estrictas; La reforma de la OCM del vino se acometerá durante la presidencia de Italia; El recorte de ayudas propuesto por la Comisión afecta a 164.000 productores españoles.

## Investigación, Desarrollo e Innovación Tecnológica



La reforma de la Política Agrícola Común; Presentación del libro La miel de Madrid; Alimentos silvestres de Madrid, editado por el IMIA, se presenta en abril; II Cursos de teleformación para la mujer rural; Presentación del libro Flora urbana y ornamental de la Comunidad de Madrid; El Encín abre sus puertas con la primavera; La colección de variedades de vid en El Encín se moderniza; Laboratorio enológico y laboratorio de análisis de suelos: un servicio para los agricultores de Madrid; Delegaciones comarcales de Agricultura en la Comunidad de Madrid; Medidas agroambientales. Control integrado; Energías alternativas aplicadas en agricultura; La industria de transformación de productos de la pesca de la Comunidad de Madrid; La agricultura madrileña mejora su cuenta de resultados; Los nuevos Sistemas de Información Geográfica.

## Varios

Publicaciones (24); Variedades de cereales de invierno y de leguminosas grano obtenidas por el IMIA. Garbanzo de invierno (29-30); Madrid, Pueblo. Pueblo; Prádena del Rincón: La naturaleza en estado puro (50-54).

## La DGA desea consolidar 7.000 hectáreas de regadíos en Valdejalón y Cariñena

El Gobierno de Aragón propone llevar agua del Canal Imperial de Aragón hasta las comarcas de Valdejalón y Campo de Cariñena para consolidar 7.000 hectáreas de regadío que actualmente se abastecen gracias al acuífero de Alfamén. La obra tendría un coste de 16,15 millones de euros y permitirá mejorar la agricultura más rentable económicamente de todo Aragón, basada fundamentalmente en frutas, hortalizas y vino.

Según el estudio realizado por la empresa pública SIRASA (Sociedad de Infraestructuras Rurales Aragonesa, SA), la toma se realizará en el punto kilométrico 62 del Canal Imperial de Aragón a la cota 242,5 metros sobre el nivel del mar. Mediante una impulsión de 7.500 metros se elevará el agua hasta un embalse regulador de 1,8 hectómetros cúbicos localizado en la falda de La Muela. Desde este embalse, se realizará una segunda impulsión de otros 7.500 metros. Desde este punto más alto (430 metros), el agua recorrerá 15.400 metros por presión natural hasta llegar a la zona de riego que está en la cota 400.

El caudal procederá de aguas sobrantes de invierno del Canal Imperial. La dotación de apoyo prevista es de 1.000 metros cúbicos

por hectárea y año, lo que supone una demanda total anual de 7 hectómetros cúbicos.

### Seis municipios beneficiados

Esta actuación beneficiará a seis municipios (Aguarón, Alfamén, Almonacid de la Sierra, Cariñena, Cosuenda y Longares) con una población aproximada de 7.500 habitantes y con un claro repunte poblacional. El estudio encargado por el Gobierno de Aragón se ha realizado a petición de los municipios y de la Asociación de Usuarios Pozos de las comarcas de Campo de Cariñena y Valdejalón (APOCAVAL).

En los últimos cuatro años, más de medio centenar de jóvenes agricultores se ha incorporado a esta actividad en estos seis municipios, situándose al frente de

explotaciones modernas y competitivas de la Comunidad Autónoma.

Por su parte, las empresas agrarias de la zona, con alrededor de 1.000 titulares de explotación con ocupación única en las tareas del campo y otros tantos con ocupación a tiempo parcial son cifras que ponen de manifiesto que la permanencia de la actividad agraria en estos pueblos está garantizada.

En total, estos seis municipios cuentan con 88 industrias agroalimentarias instaladas en sus términos (casi el 8% del total de Aragón) que ocupan a 333 empleos fijos y 42.500 jornales eventuales. Sólo en el periodo 2000-2002 se han invertido 20 millones de euros en la modernización de la agroindustria de la zona.

Todas estas fortalezas se encuentran amenazadas por la infradotación de agua y por la falta de garantía del regadío por el agotamiento de los recursos disponibles desde el acuífero de Alfamén y la inexistencia de recursos superficiales.

Por ello, el Gobierno de Aragón apuesta por esta alternativa de captación de agua desde el Canal Imperial de Aragón para consolidar esta actividad económica implantada en la zona y ligada a la agroindustria.

### Camino Ruesca-Miedes

El camino rural que va desde Ruesca hasta Miedes de Aragón, en la comarca de la Comunidad de Calatayud, cambiará su firme de tierra por un pavimento asfáltico. Los ayuntamientos de ambas localidades habían solicitado de la Diputación de Zaragoza que arreglara una vía que, a pesar de su estado, era más usada por los vecinos que la carretera autonómica de nueve kilómetros que los une.

En la actualidad, este vial tiene una importante densidad de tráfico. Lo usan no sólo los agricultores en sus desplazamientos, sino también los comerciantes, los servicios sanitarios, los vecinos que atienden asuntos particulares.

### La Ley de Sanidad Animal para mediados de mayo

La nueva Ley 8/2003 de Sanidad Animal (BOE), que entrará en vigor a mitad de mayo, recoge las normas básicas para el ordenamiento sanitario de los animales y sus productos, regulando las condiciones sanitarias de las explotaciones, los controles e inspecciones a efectuar obligatoriamente para evitar la

aparición y propagación de epizootias, a través de certámenes ganaderos o del comercio internacional. El nuevo marco legal potencia, asimismo, la trazabilidad por medio de un triple vía, que incluye un sistema nacional homogéneo de identificación de animales y un registro nacional de explotaciones.



# MULTICAJA

Caja Rural Aragonesa y de los Pirineos

08 MAYO 2003



# BOLETIN DE INFORMACION

# agraria y pesquera

NUMERO

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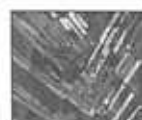
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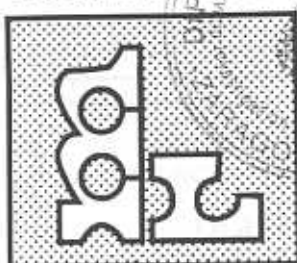
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Del 2 al 8 de mayo de 2003

Núm. 1.841 - Año XXX

La recuperación del vacuno no ha provocado correcciones bajistas en el resto de las carnes

La clara recuperación del consumo de carne de vacuno a lo largo del pasado año 2002, no les ha supuesto al resto de carnes ningún retroceso en sus cantidades consumidas: todas han crecido tanto en consumo como en gasto y, exceptuando el ovino (sin cambios), todas han subido también sus precios de venta a consumidor (reflejo de un desvío del consumo hacia carnes con certificado de calidad). El resultado final es que el consumo total de carnes en los hogares españoles (el 73% del consumo total) en 2002 subió un +4,6% en cantidad y un +10,0% en gasto, situándose todas las carnes en cifras superiores a las que mostraron en 2000, antes de la crisis EEB que provocó un importante desvío del consumo de carne de vacuno hacia el resto. Sumando el consumo extradoméstico (restauración e instituciones), los españoles han consumido en 2002 (respecto a 2001) un 4,0% más de kilos de carnes y han gastado un 4,5% más: el incremento porcentual del gasto es superior en el consumo de los hogares, donde, probablemente, se centran en mayor medida las compras de carnes de mayor calidad y, por tanto, más caras).

Respecto al lugar de compra de los alimentos, el supermercado se mantiene con la mayor cuota (42,3%), aunque no varía respecto al año pasado. Por detrás, aparecen las compras en tiendas (30,9%: bajan 4 décimas respecto a 2001) y en hipermercados (17,5%: bajan 8 décimas). Estos descensos han ido a incrementar las operaciones realizadas a través de "formas no convencionales de compra" (9,3%: suben 1,2 puntos).

- En las carnes frescas de cer-

## EL CONSUMO DE CARNES EN ESPAÑA AUMENTÓ UN 4,5% EN CANTIDAD Y UN 10% EN GASTO EN EL AÑO 2002

EVOLUCIÓN DEL CONSUMO ALIMENTARIO EN EL HOGAR EN ESPAÑA EN 2002. Fuente: MAPA

	Consumo en miles de Kg			Gasto en miles de euros			Cuota de mercado (%)	
	2001	2002	02%01	2001	2002	02%01	2001	2002
Fresca	1.632.163	1.734.691	+6,3	7.391.948	8.354.636	+13,0	16,5	17,2
Vacuno	249.572	305.410	+22,4	1.691.539	2.234.612	+32,1	3,8	4,6
Pollo	596.411	608.810	+2,1	1.710.755	1.791.871	+4,7	3,8	3,7
Ovino	119.382	126.924	+6,3	926.583	983.059	+6,1	2,1	2,0
Cerdo	466.432	486.478	+4,3	2.217.753	2.487.522	+12,2	5,0	5,1
Congelada	28.778	32.341	+12,4	105.093	125.521	+19,4	0,2	0,3
Transformada	501.660	494.871	-1,4	3.450.930	3.562.513	+3,2	7,7	7,3
TOTAL	2.162.600	2.261.903	+4,6	10.947.971	12.042.670	+10,0	24,5	24,8

	Consumo per capita (Kg/habitante/año)		Gasto per capita (euros/habitante/año)		Precio medio (euros/Kg)		
	2001	2002	2001	2002	2001	2002	02%01
Fresca	40,32	42,63	182,61	205,34	4,53	4,82	+6,4
Vacuno	6,17	7,51	41,79	54,92	6,78	7,32	+8,0
Pollo	14,73	14,96	42,26	44,04	2,87	2,94	+2,4
Ovino	2,95	3,12	22,89	24,16	7,76	7,75	+0,1
Cerdo	11,52	11,96	54,79	61,14	4,75	5,11	+7,6
Congelada	0,71	0,79	2,6	3,09	3,65	3,88	+6,3
Transformada	12,39	12,16	85,25	87,56	6,88	7,2	+4,7
TOTAL	53,42	55,59	270,45	295,98	5,06	5,32	+5,1

do, la cantidad comprada creció un +4,3%, mientras que el valor de esas compras subió un +12,2%, gracias a un incremento de su precio medio del +7,6%.

- En las carnes transformadas, la cantidad comprada sigue bajando cada año (ahora, -1,4%), pero el gasto todavía se incrementa en un +3,2%, lo que arroja una subida del +4,7% en los precios en el mostrador.

- En la carne de ovino, consumo y gasto subieron de forma similar (poco más del +6%), reflejo de unos precios al consumidor que no variaron prácticamente de un año a otro

(-0,1%) en lo alto de las carnes.

- En la carne de pollo, el precio medio subió un +2,4% y el gasto total, con un +2,1% de cantidad comprada, subió un +4,7%.

- La carne de vacuno ha recuperado en 2002 su nivel de antes de la crisis EEB. Después de haber cerrado el 2001 con descensos de alrededor del -20%, en 2002 ha subido en un +22,4% su consumo y en un +32,1% el gasto de ese consumo. Esa diferencia se explica por unos precios que subieron un +8,0%..., después de no haber bajado (al revés, su media subió) en el año de la crisis, 2001.

# BOLETÍN

## informativo

para la empresa

**EDITA**

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08 MAYO 2003

**NOTAS**

■ **Firma Electrónica en facturas.** La Agencia Estatal de Administración Tributaria ha dado luz verde al uso de la firma digital en las facturas electrónicas. Esto supondrá un ahorro próximo a los 18 millones de euros al año, sólo en las empresas del sector del gran consumo al eliminar las facturas en papel y permitir el uso de la firma digital en ellas. El coste de una factura en papel se calcula en 0,75 euros, mientras que la factura electrónica puede costar 0,05 euros. Así, la factura electrónica, que además tiene validez en toda Europa, reduce los costes de impresión, envío y almacenaje y permite reducir el tiempo que requiere su manipulación. Actualmente, más de 2.700 empresas españolas intercambian anualmente 12 millones de facturas electrónicas y otros documentos, a través del programa EDI, un sistema de intercambio electrónico de documentos comerciales que se utiliza desde 1981

■ **Mejores Prácticas disponibles.** La Comisión Europea ha adoptado recientemente los documentos de referencia sobre las mejores técnicas disponibles en: curtido de cueros, refinerías de petróleo y de gas, industria química orgánica de gran volumen y tratamiento común de agua y gases residuales-sistemas de gestión del sector químico. Estos documentos están disponibles en Internet: <http://eippcb.jrc.es>

■ **Investigación logística.** El Gobierno de Aragón y la Universidad de Zaragoza han suscrito un convenio de colaboración para promover la investigación logística en la Comunidad Autónoma, a través del Programa PILOT (Programa de Innovación Logística en Aragón) que desarrolla el IAF. El Grupo PILOT se crea para fomentar la investigación en las empresas como una herramienta de competitividad cada vez más importante hoy en día. Sus trabajos se centrarán en el estudio de nuevas técnicas en el campo de la logística, así como en su posible aplicación y posterior evaluación. Para conseguir este objetivo se han diseñado varias acciones. En primer lugar, la activación de líneas de investigación en aspectos relacionados con la integración, aprovisionamiento, producción, almacenamiento, distribución, transporte y comercio electrónico. En segundo lugar, se formará a través de becas a investigadores en temas logísticos y se creará un fondo de documentación en logística, así como una base de datos que favorezca la investigación, con acceso a las empresas adheridas al Programa PILOT.

■ **Legislación Comunitaria.** En cumplimiento del compromiso asumido en el Plan de Acción para Legislar mejor de 2001, la Comisión ha adoptado varias iniciativas para asegurarse de que las normas comunitarias vinculantes y de aplicación general (reglamentos, directivas y decisiones) sean claras, comprensibles y proporcionales a sus objetivos legítimos. La Comisión entiende que, en la medida de lo posible, debería actualizarse y simplificarse la legislación vigente. Por ello, la Comisión acaba de lanzar una consulta de manera que las partes interesadas puedan dar su opinión sobre los indicadores que se están utilizando para evaluar el potencial de simplificación de los diferentes ámbitos políticos. La consulta pública ahora lanzada permanecerá abierta a la remisión de opiniones por parte de las partes interesadas hasta el 31 de mayo de 2003. La encuesta puede ser cumplimentada desde la siguiente dirección de Internet: <http://www.europa.eu.int/yourvoice/forms/dispatch.jsp?form=247&lang=ES>

■ **Hacienda reforzará el control sobre filiales.** La Agencia Tributaria (AEAT) ha anunciado que reforzará sus actuaciones de control sobre las empresas que fraccionan sus negocios en pequeñas filiales con el objetivo de descubrir y evitar aquellos casos en los que el único objetivo es rebajar fraudulentamente su factura fiscal. Así, Hacienda pretende investigar las operaciones de las filiales con ingresos anuales entre 3 y 6 millones de euros.

■ **El Gobierno flexibiliza las normas de registro de los dominios '.es'** El Ministerio de Ciencia y Tecnología ha puesto en marcha un plan para reorganizar el dominio ".es" y adaptarlo a las nuevas necesidades. Más facilidades para lograr el dominio y precios más baratos, las armas con las que el Gobierno pretende conseguir 45.000 nuevos ".es" en el año 2003. El Plan permite el registro de nombres de dominio ".es" para páginas web a personas físicas y profesionales. Asimismo se crean cinco subdominios nuevos: ".com.es", ".nom.es", ".org.es", ".edu.es" y ".gob.es".

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# Distribución y Consumo

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2003

08 MAYO 2003



FOTO PERIADA

## MERCADO NUESTRA SEÑORA DE ÁFRICA. SANTA CRUZ DE TENERIFE

Este es, probablemente, uno de los mercados más bellos de España. Construido en 1944, con un diseño de estilo colonial, durante los últimos años ha sido remodelado hasta convertirse en uno de los elementos más dinámicos de actividad comercial y atracción turística en Tenerife. (Más información en página 150).

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# the Exchange

The newsletter of the American Agricultural Economics Association

## From the President

### Uncertain times underline importance of economic research



Three who risked their early careers with unorthodox theories shared the latest Nobel Prize in economics. Akerlof, Stiglitz and Spence wrote and promul-

gated theories of asymmetric information and decisions under uncertainty, which have by now penetrated mainstream economic theory and research. It is ironic, in some way, that the theme of this year's prize-winning work was uncertainty. We have never lived with more uncertainty in America than we do right now. Everything we plan, prepare, or predict is done knowing that there is a greatly heightened chance that it will not happen, that folks may not show up, or that all resources will be used up fighting some new kind of unimaginable foe. As Shakespeare wrote in *Macbeth*, "...Unnatural deeds, Do breed unnatural troubles..."

In this time of crisis and change, it is more important than ever that we continue our good work. We have an opportunity to display our best talents and our most compassionate instincts as we focus on making our part of the world a better place in which to live. Helping our colleagues, students and families deal with these unnatural troubles is one way we can clear some space for productive work and more peaceful thoughts. Rational decisions under uncertainty have never had more currency than today.

#### Moving on

Let us move ahead and make some plans for the coming AAEA activities. I will highlight three items that may not be

top-of-mind for many members. One is the **ASSA meetings, Jan. 4-6, 2002**. AAEA is part of the Allied Social Science Association, which meets in Atlanta this year. AAEA has the opportunity to hold six sessions at the ASSA. The availability of these time slots to AAEA depends on attendance at our sessions, so your presence at these sessions is important to all of us. The last issue of *the Exchange* and the AAEA Web site give details about our sessions this year and the Web site gives you an opportunity to register. I hope to see many of you there.

Second, there are many new useful services on the **AAEA Web site**. One that many of you will find useful is the member directory complete with direct e-mail capability and a search engine for easy location of colleagues. Another is Internet access to journal articles, including those of the *AJAE*. Click on "Information Central" and follow the links to the *AJAE* and *RAE* for the 2000 and 2001 issues. Also you should know that the publisher of *AJAE* and *RAE* has relaxed copyright restrictions significantly. Subscribers may now make copies of articles for classroom use.

Third is **POSTERS** for the summer meetings in Long Beach, July 28-31, 2002. I am making a special call for more and higher quality posters than ever before. In many scholarly societies posters are a primary method of communicating research findings and I encourage us to make a significant move in that direction. The goal of posters is to clearly communicate information, to inspire further inquiry, to promote discussion, and provide a stand-alone, take-home message to poster viewers. Posters are more likely to be viewed and discussed by more people

than any paper. If you are seriously interested in having others know you, your department and your work, this is a good way to do it. Posters are on display for casual browsers as well as serious scholars. At this year's meeting we will make every effort to give posters prominent exposure.

Posters require creative juices and communication skills. They require the authors to ask themselves how their work may be used by others. I also encourage department heads to encourage graduate students as well as star faculty members to submit posters to the AAEA Poster Selection Committee by Jan. 15. (See the last issues of the *Exchange* and the AAEA Web site for details and criteria.) Providing some monetary resources to prepare a good poster would be a great help to graduate students and younger faculty. These posters, if well done, can be used in subsequent meetings or at your home department or college to promote the work of your department.

Dr. Paul Patterson of Arizona State University is the chair of the Poster Selection Committee this year. I will be working with him and his committee to assure that there are clearer guidelines on our Web site well in advance of the due date and that those who submit posters will get feedback about the decisions to accept or reject, as well as tips for preparing outstanding posters.

One last point - the three most outstanding posters are announced at the Awards Ceremony and receive cash prizes of \$500, \$300 and \$200 for first, second and third place winners. Let us make the poster judges work extra hard this year.

Jean Kinsey



# the Exchange

The newsletter of the American Agricultural Economics Association

## From the President

### The state of AAEA - by the numbers



As members of AAEA, we are mostly applied economists and statisticians. We live and die by numbers. We measure how well or poorly

systems work by numeracy. In that spirit, I have chosen to bring us up to date about how we are doing as an association – by the numbers.

The stories being told by the numbers are that the AAEA budget deficit is falling, the use of AgEcon Search (<http://agecon.lib.umn.edu>) is increasing, proposals for various types of sessions and papers at the summer meetings in Long Beach are up, and membership holds steady even with a \$10 dues increase. What are the numbers behind the stories?

#### Budgets by the numbers

In last year's March/April issue of *the Exchange*, then-President Bruce Gardner reported that AAEA was operating with a projected 2001 budget deficit of \$250,000 on a budget of \$1.17 million. We took some drastic steps to successfully cut that deficit to \$142,133 and to cut both the total budget and the deficit for 2002 (\$1.13 million and \$106,053 respectively.) This translated into a 3.4 percent smaller budget and a drop in the actual deficit from 12 percent to a projected 9.3 percent as a percent of the budget. Our finance committee, chaired by Dr. Cathy Kling at Iowa State University, projects that in 2003 that deficit should be down to about \$33,370, all things being equal. We are going in the right direction!

We still have \$1.14 million in assets from which we can spend a limited amount each

year for special projects and operations, if necessary. We are not broke! But we must find ways to operate more efficiently and raise revenue. Donna Dunn, our executive director, and the staff at AAEA headquarters in Ames, Iowa, have done a marvelous job cutting costs and finding new revenue over the past two years. On the revenue side, they subleased some excess office space and took on the management of the American Agricultural Law Association (for a fee). On the cost-cutting side, they reduced equipment and software purchases, cut non-essential travel and limited staff dues and subscriptions. We owe them our gratitude and congratulations.

#### Revenue by the numbers

The biggest challenge is on the revenue side. Our revenue is projected to be \$1.024 million in 2002, a 4.3 percent increase. Where does our revenue come from? Only 30 percent comes from membership dues paid by more than 3,000 members. It would take 1,060 new members to wipe out our projected 2002 deficit. If you could bring in one new professional member or two new graduate student members this year, we'd be in great financial shape.

Thirty-seven percent of our revenue comes from the annual meeting registrations and fees. It would take 543 more attendees than projected for the meetings in Long Beach this summer to wipe out this year's deficit. Will you come? Will you bring along a graduate student or colleague?

Another 11 percent of revenue comes from the employment services; 12 percent comes from subscriptions to our three journals, and the rest comes from fees for

service by the administrative office. There are opportunities to raise revenue through securing private sponsors of annual meeting events and attracting more exhibitors. Advertising in our publications and new and better services, for which you and your colleagues are willing to pay, represent other revenue opportunities.

In 1970, Albert O. Hirshman wrote a book about peoples' reactions to organizations. It is called "Exit, Voice and Loyalty." As AAEA members, we prefer loyalty, but if not that, then at least give us your voice so we can provide better services to suit your needs.

#### AgEcon Search by the numbers

Louise Letnes and Patricia Rodkewich, librarians at the University of Minnesota, have piloted AgEcon Search for seven years. More than 4,000 papers and articles appear on this Web site, with that number growing at an average pace of 970 entries a year since 1998. We place the selected papers presented at each annual meeting on this Web site. Since 1998, 998 selected papers have been placed on AgEcon Search. In the first seven months that the 344 selected papers from the 2001 AAEA meetings in Chicago were on AgEcon Search, they were downloaded 18,210 times, or about 53 times apiece on average. If you presented a selected paper, your work is being used, far beyond the audience you reached at the meetings themselves.

A quick tally shows some deterioration in the "download rate" over time. Those put up in 2000 were downloaded an

Continued on page 2

# Feedstuffs

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

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## SPECIAL REPORT

### Concept, application of 'intensified calf feeding' explored

Research was conducted to more accurately define the nutrient requirements for Holstein cattle from birth to better describe calf growth.

By MIKE VAN AMBURGH

The purpose of this article is to review the current data and the relevant implications concerning the concept of "accelerated calf growth." This is a much-maligned term and often conjures up both good and bad approaches and outcomes to calf feeding and management.

Dr. Jim Drackley suggested (Drackley, 2001) that we should call it "biologically normal growth," and in fact, this is what we were attempting to describe with the work of our graduate students at both Cornell University and the University of Illinois. Some have suggested that due to a lack of a systematic approach, there is no need to follow such a program.

The intent of this article is to address these issues with respect to calf and heifer rearing programs in the U.S. using available data and nutrient requirement prediction systems.

#### A systematic approach

Much of the nutrient requirement data generated over the last 40 years has dealt with cattle of beef breed origin (Garrett, 1980, 1987; National Research Council [NRC], 1978, 1984, 1996, 2001). Almost all of these cattle were fed in a cow/calf operation up to weaning weight. Subsequently, few animals were slaughtered at less than 250 kg of bodyweight, which indicates that data available for nutrient requirements for animals less than this weight were based on very little data or were extrapolations.

Due to the nature of how calves are reared, the beef industry has not had a need to define the requirements of suckling cattle.

For dairy breeds, this early period of growth has been considered the "critical period" of development for the mammary gland, and there are many published papers describing the effect of growth rate and fat deposition on the development of the mammary gland

■ Dr. Mike Van Amburgh is an associate professor in the department of animal science at Cornell University, Ithaca, N.Y.



(Sejrsen et al., 1982). Therefore, minimizing fat deposition while optimizing gain might allow for modest increases in early growth that would translate into similarly modest reductions

in age at first calving without deleterious effects on mammary growth or lactation milk yield.

Also, a more systematic approach to age at first calving seems warranted

since the national average is still in excess of 26 months.

With this in mind, we started a series of ongoing studies to examine the nutrient requirements of Holstein calves and heifers and some of the regulation of that early growth (Diaz et al., 2001; Tikofsky et al., 2001; Smith et al., 2002).

Our original intent in this research was to more accurately define the nutrient requirements for Holstein cattle from birth so we could do a better job of describing growth. Early in this work, we realized that a systematic approach to calf nutrition was lacking. There were no "tools in the toolbox" that would allow nutritionists, calf managers or academics to evaluate how well the feeding program was meeting their requirements.

Parallel to our efforts, Drackley and his graduate students were conducting similar studies on neonatal calves (Bartlett, 2001; Blome, 2002) for simi-

Concept/p. 20

### Optimizing grain dryer operations essential to producing quality corn

Operational tips are offered to help elevator managers optimize the performance of their grain dryers, which is important in a year like this when highly variable harvest moisture, late and uneven crop maturity and poor weather conditions can expose many weaknesses in terms of grain dryer operations.

By DIRK E. MAIER and RICARDO E. BARTOSIK

Management and equipment shortcomings can create significant bottlenecks and frustration among elevator managers and farmers alike. Whether you own and operate your own drying system or deliver to someone else's

■ Dirk E. Maier and Ricardo E. Bartosik are with Agricultural & Biological Engineering at Purdue University. This article was adapted from "Grain Quality Fact Sheet #15" that was extensively revised this fall. Additional information can be found at [www.grainquality.org](http://www.grainquality.org).

dryer, long drying times frustrate everybody. The following is a summary of operational tips to optimize the performance of grain dryers.

#### In-bin dryers

Before loading a drying bin, grain cleaning should be considered. High concentration of fine material in the center of the bin can produce non-homogeneous airflow (up to 30% difference in airflow between center and side wall locations have been documented). Uneven airflow produces uneven movement of the drying front through the grain bulk. In addition, fine material tends to be wetter than grain. Thus, the combination of lower airflow and higher moisture content in the center results in significantly slower drying and greater potential for spoilage in the center compared to grain close to the sidewall.

Although fines are more difficult to remove from wet than dry corn, wet corn should be screen-cleaned if it is to remain in the same bin for storage. A spreader is generally the only feasible way to come close to a level fill, which is critical in assuring even air distribution for drying. Although undesirable, some hand leveling may be needed to compensate for uneven spreading. Utilizing a spreader to distribute fines when filling a bin with dry corn can be less effective than combining a grain cleaner and the drawing of a core. Drawing out dry corn multiple times while filling a bin is even more effective than drawing a core once after filling.

fan power. The optimum combination of airflow and fan power typically results in a grain depth of 14-16 ft. However, grain depths of 18-21 ft. are most typical for NA/LT drying systems. Although more expensive initially, buying diameter is preferable over buying depth and results in lower operating costs and better system performance.

If the bin is completely filled with corn above 20% in a single batch, by the time the drying front reaches the top layer, the grain could be spoiled and mycotoxins could develop. If moisture contents are above 20%, a drying bin should not be filled in a single batch but in layers. The wetter the grain, the shallower the layers should be (Table 1, p. 10). Better yet, if several bin dryers are available, layers of grain should be spread into all of them. Distributing the drying load over more than one bin maximizes the drying capacity. Also, early in the season, the moisture content is highest. Thus, the wettest grain can be dried closest to the bottom of each bin where the drying potential of the air is highest.

The drying front must be monitored closely. Often, layers of higher and lower moisture content grain are added on top of each other. As the drying front moves up through the grain, moisture is added to some layers and removed from others. Monitoring the top layer of the grain mass has to occur over several days. A reading of 18% moisture on one day may increase to a reading of 20% the next day as the drying front pushes through

# FEEDSTUFFS

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## Meeting held to discuss risk guidance

By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — The first public review of the Food & Drug Administration's proposed guidance on how it plans to evaluate resistance risks of antibiotics used by the livestock industry was held Oct. 2.

The meeting drew a room full of medical doctors, veterinarians and other scientists. However, it again illustrated that a quest for "science-based" policy need not assume that agreements are easily reached among scientists.

The guidance was published in the Sept. 13 *Federal Register* (*Feedstuffs*, Sept. 16).

Time is now crucial on the policy that has been under development since 1998. The public comment period ends Nov. 27 on the draft guidance. The final version will follow.

Meanwhile, FDA has already begun reassessing some current animal drugs,

at its own expense, for resistance safety under the proposed protocol, according to Dr. Linda Tollefson, the FDA official who moderated the meeting.

The guidance is based on FDA's belief "that human exposure through the ingestion of resistant bacteria from animal-derived foods represents the most significant pathway for human exposure to resistant bacteria that have emerged" from the use of antimicrobial drugs in animals.

The guidance addresses only resistance from direct ingestion in food; it does not address any risks from shedding of resistant bacteria from animals in the environment.

Still, there was not even agreement on the exposure assessment. Dr. John Waddell, testifying for the American Veterinary Medicine Assn., noted that exposure risk was based on data reporting per capita consumption figures, but that data failed to take into consider-

ation that many of the animal products eaten by humans are cooked or pasteurized to kill bacteria.

The National Pork Board's Dr. Paul Sundberg, a veterinarian with a doctorate in a related field, testified that FDA had mischaracterized the nature of the risk of transmitting resistance via food.

Noting that FDA outlined the risk that antibiotic resistance poses for the treatment of human tuberculosis, legionellosis and meningitis, he pointed out that "these clearly are not pathogens or conditions that are related to foodborne transmission of organisms." He called on FDA to show data of the link — noting that its concern otherwise was "more emotional than scientific."

Under the FDA guidance, all animal antibiotics will be assessed and "categorized" into three rankings — high, medium and low — for their importance

*Antibiotics/ p. 4*

## Agway, subsidiaries file for bankruptcy protection

By MICHAEL HOWIE

Feedstuffs Managing Editor

In order to buy more time to get its financial house in order, Agway Inc. announced Sept. 30 that the company and several subsidiaries will voluntarily reorganize under Chapter 11 of the U.S. Bankruptcy Code.

Agway, a cooperative owned by 69,000 producers in the Northeast, filed its petition with the bankruptcy court in Utica, N.Y., Oct. 1.

Units involved in the reorganization plan include Agway Feed & Nutrition,

Agway Agronomy, Seedway, Feed Commodities International (FCI), Country Best Produce, CPG Nutrients, CPG Technologies and Agway General Agency.

Four wholly owned Agway subsidiaries not included in the Chapter 11 filings were Agway Energy Products LLC, Agway Energy Services Inc., Agway Energy Services-PA Inc. and Telmark LLC. Agway dealer stores are not included because they were sold to Southern States Cooperative Inc. in 2000

*Agway/ p. 7*

## Poor business choices prompted MCP sale to ADM

By GIL GULLICKSON

Feedstuffs Correspondent

Minnesota Corn Processors (MCP) seemingly had it all from the mid-1980s to the mid-1990s.

The stock price for the farmer-owned Marshall, Minn., corn processor zoomed from \$2 per share to \$5 per share and split several times during this period. MCP paid 30-cent to \$1/bu. dividends to its members from 1984 to 1995. It seemed that MCP couldn't miss.

It missed. A costly decision in the mid-'90s to manufacture corn fructose helped send MCP into a downward spiral from which it never recovered. In 1997, Archer Daniels Midland Co. (ADM) rescued MCP from bankruptcy by buying 30% of the firm's shares. Even so, its share price never recovered. Last month, 81% of MCP members approved a sale for all remaining shares to ADM for \$2.90, almost triple the market share price of \$1.

"Unfortunately, I thought it was the right thing to do at this time," said Sandy Ludeman, a Tracy, Minn., farmer and MCP board member who served as MCP vice chairman from 1998 to 2001. "But there were lots of decisions made in the past that put MCP in this position."

### One for all; all for one

MCP was one of the Upper Midwest's first "new-generation" cooperatives that processed its farmer-members' commodities into food products (story, p. 25). MCP had high hopes when it first began processing its members' corn into corn starch and corn syrup in 1983. "There was a lot of togetherness," said Don DeLanghe, a Marshall farmer and MCP director for 17 years. "There was a feeling that if we kept our noses to

## POULTRY FOCUS

### Inside News

#### WTO evaluates Australia

Australia was forced to defend its strict import regime recently in the face of unusually sharp, nearly universal criticism of this system by other countries at the World Trade Organization. **Page 4.**

#### AFBF moves headquarters

The board of directors of the American Farm Bureau Federation (AFBF) voted to consolidate its headquarters in Park Ridge, Ill., into its legislative office in Washington, D.C., so it can focus more intensely on public affairs. **Page 4.**

#### EU to approve GM rules

A leading British environmental group said the European Commission has dismissed complaints from the U.S. and others about new European Union rules governing genetically modified (GM) foods. **Page 5.**

#### Cattle antimicrobial therapeutic approved

A new antimicrobial treatment for bovine respiratory disease associated with *Mannheimia (Pasteurella) haemolytica* and *Pasteurella multocida* in beef cattle developed by Pfizer Animal Health has received Food & Drug Administration approval. **Page 5.**

#### Ethanol plants upgrade emission controls

The Department of Justice, U.S. Environmental Protection Agency and the state of Minnesota have reached agreements with 12 Minnesota ethanol plants to reduce volatile organic compound emissions 95%. **Page 18.**

### Business

#### Farmland gets extension

Farmland Industries Inc. has been given additional time to develop its reorganization scheme to emerge from the cooperative's bankruptcy process. **Page 6.**

#### Moody's changes

#### McDonald's ratings

Moody's Investors Service has confirmed senior unsecured long-term and short-term ratings for McDonald's Corp. but has changed the company's outlook to negative and said long-term ratings could yet be downgraded if the company cannot demonstrate near- to intermediate-term earnings improvement. **Page 7.**

### Markets

#### Markets sink lower as bull market fades

Bearish sentiment routed grain and oilseed markets as harvest pressure continued to hamper futures prices. **Page 29.**

#### Hog report bullish

## Port closures disrupt exports of grain, meat

By MICHAEL HOWIE

Feedstuffs Managing Editor

Disagreements over the future direction of labor contracts and stalled negotiations led to a general lockout of West Coast dock workers Sept. 29, essentially closing 29 major ports on the West Coast from San Diego, Cal., to Seattle, Wash.

The labor contract between the Pacific Maritime Assn. (PMA), which represents shipping lines and sea terminal operators, and the International

Longshore & Warehouse Union (ILWU), representing about 10,500 dock workers, expired July 1, and the two sides have been at odds ever since. ILWU was signing day-to-day contract extensions but stopped recently. Without an active contract, PMA cannot bring arbitration cases against the union in case of a worker slowdown.

PMA originally locked out the union Sept. 27, charging that the union had coordinated a work slowdown. The

*Ports/ p. 5*

# FEEDSTUFFS

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

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## DAIRY FOCUS

### USDA to study grain warehouse rule

■ By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — The U.S. Department of Agriculture announced a 90-day moratorium Oct. 9 on accepting new applications for federal grain warehouse licenses.

The action came in response to concerns voiced on its final rule to implement the U.S. Warehouse Act of 2002.

State departments of agriculture, several producer groups and Senate Agriculture Committee chairman Tom Harkin (D., Iowa) have criticized the rule. Eleven farm and commodity organizations asked USDA to delay the rule Oct. 7. They charged, "It pre-empts states from regulating commodity merchandising activities of federally licensed warehouses."

In a letter to Agriculture Secretary Ann Veneman, 11 major producer groups said under the new rule, "li-

censed warehouses that handle and store commodities would have no federal merchandising regulations for buying and selling those commodities."

Jim Miller, National Farmers Union official, told *Feedstuffs* the new USDA rule would encourage grain elevators to become federally licensed rather than state licensed because of the proposed lower regulatory oversight.

However, in a statement announcing the moratorium, USDA undersecretary J.B. Penn said the rule simply spelled out existing law.

The final rule, published in the Aug. 5 *Federal Register*, "reiterated USDA's long-standing policy that federally licensed warehouse operators are subject to a single set of regulatory requirements," Penn said.

"This was the first time USDA's policy on the buying and selling of warehousing activities had been explained in

regulation," Penn said. "The policy, established by a 1947 U.S. Supreme Court decision, states that warehouse operators cannot be required by state governments to be licensed by both federal and state governments."

"The Aug. 5 rule clarified for the public that federally licensed warehouse operators need not comply with state requirements regarding warehousing activities, including the buying and selling of grain," he said.

Nonetheless, the rule drew criticism from the National Association of State Departments of Agriculture (NASDA) and Harkin. During its annual meeting in early October, some NASDA members sought — and modified after the USDA announcement — a resolution asking Congress to amend the Warehouse Act.

At the urging of the National Grain & *Rule/ p. 17*

### Crop production report contains no big surprises

■ By GIL GULLICKSON

Feedstuffs Correspondent

Analysts pegged last Friday's U.S. Department of Agriculture production report as bullish for soybeans but more neutral for corn.

USDA forecasted soybean production at 2.656 billion bushels, virtually unchanged from September's 2.656 billion-bushel forecast but 8% below last year's production. Based on Oct. 1 conditions, USDA expects yields to average 37 bu. per acre, unchanged from last month. If realized, this would be the lowest production since 1999. USDA also pegged soybean ending stocks at 175 million bushels, up 15 million bushels from September's 160 million estimate (Table, p. 21).

USDA forecasted a slight increase in corn production compared to September's report. The 8.97 billion-bushel forecast was 1% more than last month's estimate of 8.849 billion. Even so, the forecast is still 6% below the 2001 corn crop.

Based on Oct. 1 conditions, USDA expects yields to average 127.2 bu. per acre, up 1.8 bu. from September but down 11.0 bu. from last year. If realized, production would be at the lowest level since 1995. USDA projected corn ending stocks at 765 million bushels, a 36 million-bushel increase over September's projected 729 million bushels.

"The corn number was at the high end of expectations," said Greg Grow, a senior account executive with O'Brien Investor Services. "That's certainly reflected in the price level we're currently trading at."

In futures trading last week, December corn declined 6.25 cents/bu. for the week, from \$2.5775 at last Monday's

### Inside News

#### WTO March deadline

Canadian Agriculture Minister Lyle Vancielief said he remained confident that World Trade Organization talks on agriculture will meet a crucial deadline next March for completing work on the basis for agricultural trade reform. *Page 4.*

#### Newcastle detected in California flocks

The California Department of Food & Agriculture announced that it is investigating an outbreak of Exotic Newcastle Disease in small flocks of backyard birds in Southern California. *Page 4.*

#### NAMA disputes

##### Canadian wheat dumping

Members of the North American Millers' Assn. (NAMA) testified Oct. 4 in favor of keeping wheat trade open with Canada. *Page 4.*

#### West Coast ports open

Agribusiness joined the nation's manufacturers and consumer goods industries in praising the action by President George Bush to order union workers at 29 West Coast ports back on the job. *Page 5.*

#### Russian farm subsidies

Russian farm subsidies climbed to \$2.5 billion last year, according to the Organization for Economic Cooperation & Development, but remain well below those paid in most developed countries. *Page 17.*

### Business

#### Dow, Monsanto reach technology agreement

Dow AgroSciences LLC and Monsanto Co. have announced an agreement on a series of royalty-bearing licenses and options to products and technologies related to insect-protected corn and Roundup Ready corn, soybeans, cotton and canola. *Page 6.*

#### Phoenix Scientific sells controlling interest

Phoenix Scientific Inc. recently announced the sale of a controlling equity interest in it to an affiliate of Leonard Green & Partners LP. *Page 7.*

### Markets

#### Ingredients dip

December soybean meal futures dropped at their close last Thursday, and the price dip also weakened linseed and canola meal prices for the week. *Page 21.*

#### Hens being held

Egg prices remained weak last week as

### Industry, R-Calf point to flaws in labeling rule

■ By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — Reaction to the U.S. Department of Agriculture's release last week of the interim rule on voluntary country-of-origin labeling has revealed flaws — or at least serious considerations.

Not surprisingly, two associations representing meat processors had the most critical reactions.

The American Meat Institute (AMI), which strongly opposed the measure in the new farm bill, issued a strongly worded statement when the rule for the

two-year voluntary program was announced Oct. 8.

"USDA's guidance for implementation of mandatory country-of-origin labeling for meat products is the most costly, cumbersome and complex labeling proposal in history," AMI president Patrick Boyle said.

"Consumers are unlikely to ever see the labels that USDA described in voluntary guidance issued today because this program cannot be implemented," he continued.

U.S. plants "source our raw materials *Labeling/ p. 5*

### EU proposes entrance of 10 new countries in 2004

■ By IAN ELLIOTT

Feedstuffs Correspondent

The European Commission proposed Oct. 9 that 10 new countries join the 15-nation bloc starting in 2004.

Commission President Romano Prodi said the 10 mostly eastern European countries — Poland, Hungary, the Czech Republic, Slovakia, Lithuania, Latvia, Estonia, Slovenia, Cyprus and Malta — met the political and economic conditions required for joining the European Union at the start of 2004.

"The commission, therefore, recom-

mends to conclude the accession negotiations with these countries by the end of this year with the aim to sign the Accession Treaty in spring 2003," Prodi told the European Parliament.

The former Italian prime minister added that the commission will "do its utmost" to help Bulgaria and Romania join the expanded EU by 2007. However, Prodi and his commission set no deadline for completing enlargement talks with Turkey despite pressure from the Bush Administration, which views

*EU/ p. 4*

# FEEDSTUFFS

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## Inside News

### EU salmonella rules

European Union farm ministers were not able to agree on new tougher rules designed to eradicate salmonella in poultry and egg production when they met last Monday in Luxembourg. **Page 3.**

### USDA to step up

#### listeria testing in plants

In a major announcement Oct. 17, the U.S. Department of Agriculture said it will step up its testing in meat plants for *Listeria monocytogenes* and require meat plants to tighten controls for the bacterium that can cause illness and death in the elderly, pregnant women and immunosuppressed people. **Page 3.**

### EU politicians block easing of GM food ban

European farm and environment ministers sent a clear message last week to countries hoping to see an early easing in the EU's moratorium on genetically modified (GM) foods: forget it. **Page 5.**

### Organic program

Nothing has been easy about the 12-year battle to begin the nation's certified program for organic food, but at last, the formal program is set to begin Oct. 21. **Page 17.**

## Nutrition & Health/Beef

### Corn steep inclusion

A University of Nebraska research trial determined that the inclusion of corn steep liquor at 10% of the diet in steam-flaked corn/corn bran-based finishing diets may be beneficial in improving feed efficiency. **Page 9.**

## Business

### Sysco buys Abbot

Sysco Corp., North America's largest foodservice marketer and distributor, announced that it has completed the acquisition of Abbott Foods Inc., a broadline foodservice distributor in Ohio. **Page 6.**

### Chr. Hansen, Foremost create pharmaceutical alliance

Chr. Hansen Inc. and Foremost Farms USA announced the formation of a strategic alliance in which Chr. Hansen will manage the sales, marketing, distribution and technical support of Foremost Farms' line of NF Lactose for use as tablet excipients. **Page 7.**

## Markets

### Wheat market ignites corn, soybean rallies

Corn and soybean futures rallied last week following a sharp wheat futures spike fueled by a larger-than-expected Egyptian wheat purchase. **Page 21.**

### Poultry struggles

Chicken and turkey companies contin-

## USDA pledges tougher safety system

# Recall damages chicken, turkey markets

By ROD SMITH  
Feedstuffs Staff Editor

WASHINGTON, D.C. — A poultry product recall that crossed into history last week — becoming the largest-ever meat/poultry recall — did its terrible thing to the poultry sector, damaging the chicken and turkey markets and prompting retailers to return turkey whole birds just days before the critical turkey industry Thanksgiving shopping period.

The recall led some sources to wonder if one of the poultry community's legendary brand names will survive the negative and widespread publicity.

The recall caused others to question when meat and poultry processors are going to come to grips with irradiation technology and pushed government officials to respond to stinging criticism about failures in food safety with

equally strong statements that the government is moving to become ever more aggressive and unforgiving regarding its food inspection and safety mandate (story, p. 3).

Speaking to the annual business meeting of the National Chicken Council in Washington last week, Dr. Elsa Murano, U.S. Department of Agriculture undersecretary for food safety, advised company executives that the Food Safety & Inspection Service (FSIS) will become more vigilant in its sampling, including its environmental testing, and told processors to intensify their food safety work.

### Breast meat prices

There was no doubt that the chicken and turkey markets were feeling the recall in which Pilgrim's Pride Corp., the third-largest chicken producer and fifth-

largest turkey producer in the U.S., voluntarily called back 27.4 million pounds of fresh and frozen ready-to-eat chicken and turkey meat Oct. 12 that may be contaminated with *Listeria monocytogenes*, expanding its recall of 295,000 lb. two weeks ago (*Feedstuffs*, Oct. 14).

The earlier recall was a consequence of routine FSIS sampling of production at Pilgrim's Wampler Foods plant in Franconia, Pa., in which a positive reading was returned. The expanded recall was a consequence of additional environmental testing in the plant in which 25 samples were fingerprinted, with one fingerprint matching the *L. monocytogenes* strain found in sliced turkey meat that's associated with an outbreak of listeriosis in the northeastern U.S. and three fingerprints match-

Recall/ p. 22

## Iowa Select plans to appeal nuisance ruling

By ROD SMITH  
Feedstuffs Staff Editor

Iowa Select Farms said it will appeal a jury's ruling that the company must pay \$33 million to four families for being an environmental nuisance — the largest such environmental nuisance penalty ever handed out.

The jury ruled that Iowa Select's swine complex in Sac County in central-western Iowa generated excessive flies and noxious gasses and odors that diminished the value of the four families' properties, which also are farms, two of which raise livestock. The verdict was handed out Oct. 9 following a one-week trial.

The jury ordered Iowa Select to pay \$1.06 million in actual damages and \$32 million in punitive damages.

The verdict is precedent setting, according to Iowa Select chief executive officer and president Jeff Hansen and officials at the Iowa Farm Bureau and Iowa Pork Producers Assn., because it tells farmers that compliance with environmental regulations does not protect livestock producers from liability in civil nuisance suits. In the Iowa Select case, it even exceeded regulations.

Hansen noted that the complex, which grows out approximately 30,000 hogs on two primary sites, has taken a number of steps to decrease odor and pest problems, including oversizing lagoons, adding mechanical surface aeration to the lagoon nearest the plaintiffs and planting trees. After being notified that the plaintiffs took the matter to mediation, he said the complex took an additional step to implement a new, promising facultative enzyme on the farms.

He said Iowa Select, which has operations statewide in Iowa, "has invested

with a long list of other American farm programs, violate 11 provisions of WTO rules, depress international prices, cut into its exports and unfairly increase the U.S. share of the world market for cotton. The U.S. cotton program cost Brazil more than \$600 million in 2001, the complaint alleged.

The National Cotton Council of America said Brazil's complaint is "unwarranted." The council said U.S. programs comply fully with WTO agreements.

The dispute, if it goes to a WTO panel, **WTO/ p. 3**

## Brazil brings farm bill to first WTO challenge

By IAN ELLIOTT  
Feedstuffs Correspondent

The U.S. now faces its first serious challenge before the World Trade Organization on its controversial farm bill, signed into law by President George Bush in May.

Brazil cited the U.S. farm bill (the Farm Security & Rural Investment Act of 2002 — FSRIA) as one of the "prohibited and actionable subsidies" that are the center of its request for a WTO dispute panel. Brazil's complaint was made public Oct. 2.

Brazil claims that the farm bill, along

## Antibiotic use is main focus among vet groups

By SARAH MUIRHEAD  
Editor of Feedstuffs

ST. PAUL and BLOOMINGTON, MINN. — Antibiotic resistance and subsequent public health issues were among the topics at hand at two recent University of Minnesota veterinary conferences.

At both the Allen D. Lemay Swine Conference in St. Paul and the North Central Avian Disease Conference in Bloomington, human health and industry experts from around the world talked about the value and perceived

risks associated with antibiotic use in food-producing animals.

Craig Hedberg of the University of Minnesota's School of Public Health told veterinarians at the Lemay conference that antibiotic resistance has emerged as an important public health issue. Likewise, he said the use of antibiotics in agriculture raises questions of balance in the abundance and safety of the food supply.

At the same time, he pointed out that efforts to accomplish comprehensive **Antibiotics/ p. 4**

# Feedstuffs

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## Inside News

### Cairns members

#### press WTO progress

Farm and trade ministers from the Cairns Group used their annual gathering in Bolivia to press the U.S. on its farm bill as well as the European Union and Japan over progress on agriculture in the World Trade Organization Doha Round. **Page 4.**

### Farmland to put value on beef, pork units

Farmland Industries, as part of its financial reorganization, received approval last week to name a consulting firm to value its beef and pork processing interests for possible sale. **Page 5.**

### AMI passes resolutions

The board of directors of the American Meat Institute (AMI) last week passed resolutions making animal husbandry "a noncompetitive issue" among packing/processing plants and urging the U.S. Department of Agriculture to establish a pilot program to purchase irradiated ground beef for school lunches. **Page 5.**

### Pioneer files lawsuits

Pioneer Hi-Bred International filed a lawsuit against Syngenta Seeds Inc. for trade secret misappropriation and infringement of its proprietary hybrid corn and parent seed. **Page 5.**

## Nutrition & Health/Swine

### Birth weight may have effect on later growth

University of Illinois researchers said providing piglets with supplementary liquid milk replacer during lactation can increase weaning weights, but the effect on subsequent performance has not been established. **Page 9.**

## Business

### Court approves Agway's access to credit facility

Agway Inc. announced that the U.S. Bankruptcy Court for the Northern District of New York approved its motion for access to the full amount of the \$125 million debtor-in-possession credit facility. **Page 6.**

### Lonza files patent suits

Lonza Ltd. and Lonza Inc. filed a series of patent infringement lawsuits against Carnitech, Barrington Chemical, Stauber Performance Ingredients, DNP International and Axel Chemicals. **Page 7.**

## Markets

### Soybean futures lead rally, leave corn behind

Soybean futures continued to roll last week as they left corn futures in the dust. **Page 21.**

### Cattle gain \$1-2

## Study finds antibiotic ban would likely accelerate consolidation in pork industry

By SARAH MUIRHEAD

Editor of Feedstuffs

Using the lessons learned from antibiotic growth promotant bans in Sweden and Denmark, Iowa State University economists have determined that a similar ban in the U.S. would more than likely accelerate the consolidation of pork-producing operations in the U.S., as it would be particularly costly to less well-managed operations.

In a presentation to the U.S. Animal Health Assn. annual meeting in St. Louis, Mo., last week, Dermot Hayes outlined the likely impact of an antibiotic growth promotant ban in the U.S. Assisting in the analysis was Helen Jensen, also an Iowa State economist. The study, the first ever of its kind, was funded by the National Pork Board.

Acknowledging that any attempt to translate the experiences of the bans in Sweden and Denmark to the U.S. pork industry is certainly open to criticism, Hayes pointed out that some of the well-managed U.S. operations would probably not experience any major impact from a similar ban here. Many of the not as well-managed units, however, he said, would essentially be driven out of business.

If growth-promoting antibiotic use were discontinued in the U.S., "our best estimate is that production costs in the U.S. would increase by approximately \$4.50-5.00 per animal," said Hayes (Table).

The resulting consolidation would not be based on size of operation, said Dr. Paul Sundberg of the pork board,

but rather which producers have the management in place to operate under the conditions that would result from a ban. Sundberg noted the extent of consolidation would be largely related to how quickly producers would be able to come back from the initial impact of a ban.

Sweden banned the subtherapeutic use of antibiotics in finishing and weaning pigs in 1986. Denmark banned their use at the finishing stage in 1998 and the weaning stage in 2000.

In conducting their analysis, Hayes and Jensen revisited findings for an earlier study they conducted on the Swedish ban and applied to those conclusions what has been learned so far from the Danish ban.

Ban/ p. 4

## Wheat battle advances; countries refuse to give in

By SALLY SCHUFF

Feedstuffs Washington Editor

WASHINGTON, D.C. — A long-running battle between the North Dakota Wheat Commission (NDWC) and the Canadian Wheat Board (CWB) advanced to the next round last week in a test of wills of the two neighboring governments on protecting their farmers and markets.

The U.S. Department of Commerce agreed to accept North Dakota petitions seeking individual antidumping and countervailing duty investigations against the imports of both durum wheat

and hard red spring wheat CWB sells to the U.S. milling industry.

If the U.S. government proceedings find that CWB practices injure North Dakota wheat growers, by next year, additional duties could be imposed on the Canadian imports. Interestingly, such duties would be subject to the controversial Byrd Amendment, and they would accrue to the industry rather than to the U.S. Treasury.

NDWC official Jim Peterson called the Oct. 23 action by the commerce department "a tremendous step forward but

Wheat/ p. 17

## U.S. poultry could lose markets to EU enlargement

By IAN ELLIOTT

Feedstuffs Correspondent

Differences with the European Union over the use of chlorine could end up costing the American poultry industry export markets in eastern Europe, the U.S. Department of Agriculture suggested in a new publication.

The 15-nation EU is expected to wind up enlargement negotiations by the end of this year, bringing eight central and eastern European (CEE) countries inside the trading bloc starting in 2004.

As part of those negotiations, candidate countries are required to adopt all of the EU's existing regulations.

"The EU currently bans all U.S. poultry meat because of a ban on treating carcasses with chlorine," USDA explained in its "Agricultural Outlook" November issue. "Unless the issue is resolved, all acceding CEE countries will also ban U.S. poultry upon accession."

Since Communism collapsed in these countries a decade ago, the U.S. poul-

Poultry/ p. 5

## ERS launches retail meat pricing series

By ROD SMITH

Feedstuffs Staff Editor

CHICAGO, ILL. — The Economic Research Service (ERS) launched a long-sought new retail meat pricing series last week, demonstrating it to agribusiness advisers, consultants and market analysts at the U.S. Department of Agriculture's annual meeting with data users here.

The new series offers a more thorough report about beef, pork, poultry, lamb and veal prices in retail stores than the Bureau Labor Statistics (BLS) series and may provide livestock producers with a basis for pricing their animals closer to their value — especially as the cash market grows increasingly thinner — analysts at the meeting told *Feedstuffs*.

ERS also announced that it is merging three of its monthly outlook publications, including "Agricultural Outlook," into one publication that will be delivered every two weeks via webzine and published five times yearly.

Also at the meeting, Fred Vogel, deputy administrator of the National Agricultural Statistics Service (NASS), said the statistical service may assemble a committee of data users to evaluate the monthly hogs and pigs report and to recommend changes that would increase users' confidence in the report.

The monthly report, which was included in legislation that established mandatory price reporting in 2000 at the urging of the National Pork Producers Council (NPPC), which wanted monthly inventory reports to supple-

# FEEDSTUFFS

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

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Inside News

## Pork program ruled unconstitutional; judge orders halt in checkoff collections

By ROD SMITH  
Feedstuffs Staff Editor

A district judge has found the national pork program unconstitutional, queuing pork producers into an appellate line with beef producers to ask higher courts to overturn rulings that their checkoff programs violate First Amendment speech rights.

The finding in the pork program, in which Judge Richard Alan Enslin ordered that the pork program's assessment be halted Nov. 24 and that the program's operations be terminated, was handed down Oct. 25.

The beef program was found unconstitutional earlier this year and ordered terminated, a finding that has been stayed on appeal (*Feedstuffs*, July 1 and 15).

Enslin's ruling said the argument that the pork program is protected as "government speech" — a critical issue on which the beef and pork programs have been defended — does not apply, but said the program mandates pork producers to associate with speech to which they disagree, violating a constitutional right that is protected.

Enslin, sitting in the U.S. District Court for the Southern Division of the Western District of Michigan in Kalamazoo, based his ruling in part on the ruling by Judge Charles B. Kornmann that found the beef program unconstitutional and on the U.S. Supreme Court's decision last year that the mushroom program was unconstitutional (*Feedstuffs*, July 2, 2001).

It was the mushroom ruling that

prompted the Livestock Marketing Assn. (LMA), the Western Organization of Resource Councils (WORC) and eight beef producers to ask Kornmann to rule on the beef program and prompted the Campaign for Family Farms (CFF), the Michigan Pork Producers Assn. (MPPA) and National Pork Producers Council (NPPC), the latter two groups in a proactive maneuver, to ask Enslin to rule on the pork program (*Feedstuffs*, July 30, 2001, and Feb. 4).

Attorneys for the U.S. Departments of Agriculture and Justice last week were preparing to ask the U.S. Sixth Circuit Court of Appeals in Cincinnati, Ohio, for a stay of Enslin's order pending an appeal to the circuit.

Kornmann sits in the U.S. District Court. *Checkoff* p. 17

## EU approves farm budget through 2013

By IAN ELLIOTT  
Feedstuffs Correspondent

At a summit meeting Oct. 25 in Brussels, Belgium, European Union heads of government agreed on terms for financing the expansion of the EU starting in 2004.

The agreement contains two major provisions for agriculture, according to sketchy details released by Denmark, the EU president until Dec. 25. The first accepts proposals from the European Commission for a phasing in of subsidies for farmers in candidate countries. The second caps the budget on "market-related" programs and direct payments to farmers in an expanded EU.

The agreement, described as a "breakthrough" by some observers, resulted from skillful diplomacy by the French government led by President Jacques Chirac and a collapse by German Chancellor Gerhard Schroeder. Chirac's French farmers are a major recipient of EU subsidies. German taxpayers pay the largest share of these subsidies.

Chirac and Schroeder settled on final terms for the enlargement package even before the Brussels summit opened. When the agreement was presented to other EU heads of government over dinner Oct. 24, countries like Britain and the Netherlands, which had been pushing for a commitment to deep reforms of the EU's Common Agricultural Policy (CAP) before enlargement, were isolated.

It is unclear at present how the package will affect other efforts to reform the CAP.

EU Agriculture Commissioner Franz Fischler is in the midst of a midterm review of the farm policy. It is unclear if this will go ahead.

## Fischler says

### reform still needed

European Union Agriculture Commissioner Franz Fischler said a decision by EU heads of government fixing the farm budget through 2013 offered the sector the clarity needed to complete reforms he first advanced in July. *Page 3.*

## Changes to BSE

### feed rule close

Proposed changes in feed rules relating to bovine spongiform encephalopathy (BSE) are close to being published, as compliance with the current feed rule continues to improve. Dr. Dan McChesney of the Center for Veterinary Medicine said last week. *Page 4.*

## Tyson lawsuit tossed

A federal judge has dismissed a class action lawsuit that was brought against IBP Fresh Meats, a Tyson Foods Inc. business, that alleged the company paid substandard wages at its meat plant in Joslin, Ill. *Page 4.*

## Cash sales success

The sales success of the first food and agriculture trade show in Cuba in 40 years has prompted some U.S. companies to favor continuation of U.S. policy that allows cash-basis sales only. *Page 5.*

## Nutrition & Health/Poultry

### Capsaicin may deter

#### rodents from feed

Dr. R.E. Austic of the department of animal science at Cornell University, Ithaca, N.Y., said his research group has been interested in the possibility that the inclusion of chili pepper oleoresin in poultry feeds would deter mice and rats from entering feed storage bins and feeding equipment. *Page 9.*

## Business

### BASF to buy

#### ag products

BASF AG has reached an agreement to buy a package of agricultural products from Bayer CropScience AG, allowing Bayer CropScience to meet antitrust obligations for its purchase of Aventis CropScience. *Page 6.*

### Cooperative cutbacks

Southern States Cooperative announced that it is making additional cutbacks in its staff as part of an ongoing effort to boost efficiency and focus on core business operations. *Page 7.*

## Markets

### Soy exports strong, support higher futures

Soybean futures continued to roll on the heels of a favorable U.S. Department of Agriculture export report released last Thursday. *Page 21.*

### Eggs heading to trouble

## FTAA heads into crucial talks on market access

By SALLY SCHUFF  
Feedstuffs Washington Editor

WASHINGTON, D.C. — The next few months of negotiations on the Free Trade of the Americas Agreement (FTAA) likely will be rough and tumble.

After years of preliminaries, the negotiators must soon hammer out agreements on opening domestic markets. It will strain diplomacy, domestic politics and the hopes of exporting industries in each of the hemisphere's 34 countries — large and small, from the tip of Argentina to the Arctic Circle.

A top U.S. trade official calmly told reporters before departing for the Nov. 1 ministerial meeting in Quito, Ecuador, that the current draft of trade agreement "is going to be a mess with virtually everything in brackets." His lack of alarm apparently sprang from hope that the negotiating process would stay on track for the 2005 completion deadline.

The goal for the coming year will be to work through the bracketed disagreements and come up with a "cleaner text" before the next ministerial meeting.

*FTAA* p. 23

## Bioterrorism legislation requires registration, notice for imports

By MICHAEL HOWIE  
Feedstuffs Managing Editor

CHICAGO, ILL. — The bioterrorism preparedness and prevention legislation signed into law earlier this year contains several requirements for feed and food companies, said Dr. Dan McChesney, deputy director of the office of surveillance and compliance with the Center for Veterinary Medicine.

McChesney, speaking at the Pet Food Institute's annual meeting in Chicago last week, said it is important to note

that the definition of "food" in the legislation includes food, food additives, dietary supplements and animal feed. That means, he said, that title three (of five titles total) of the act, which addresses protection and the safety and security of the food and drug supply, includes measures that feed and ingredient companies will have to meet, he said.

A big part of the food portion of the bill relates to increasing imported food and feed inspections, with the greatest

*Notice* p. 4

# Feedstuffs

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## Agribusiness looks to be repeat of 2002

To see what may lie ahead in the coming year for the suppliers of regulated products and ingredients to agribusiness and the pet industry, one needs to look carefully at 2002 events and analyze current driving forces and issues.

By BOB FOUNTAIN  
and DUANE THURMAN

To some in agribusiness, this year is a year to remember, but for others, it is one they try to forget but can't. So, what can be expected in 2003 for the suppliers of regulated products and ingredients to agribusiness and the pet industry? To see ahead, one needs to look carefully at 2002 events and analyze current driving forces and issues. We believe there were four key drivers in 2002 that will have the greatest impact in 2003 for shaping performance of the 2003 agribusiness industry and the participating animal health companies. Those are:

- National and industry economic factors;
- Consumers — and how they spend and choose; how they think and shape the regulatory, political and social environment;
- Mergers, acquisitions and divestment, with increasing financial owner-

ship and more consolidation at all levels in the value chain, and

- Generic competition intensification as new product flow continues to decline in an ever-tightening regulatory environment.

In this outlook article, the following complex drivers are examined as to how they might affect the following key areas of performance for growth in 2003 and an easing of uncertainty for industry members:

- Regulated product supplier company competitive performance;
- Product and species market dynamics, and
- Our prediction for the 2003 animal health market.

### Key events, issues

**National and industry economic factors.** Following are some of the complex national, global and industry-specific economic issues and factors to keep in focus when looking to 2003 and planning business activities. Unfortunately, agribusiness is not able to control many of the macro drivers. The list includes:

- Equity market. The equity market continued an accelerating swan dive in 2002, which has led to more than \$8 trillion in lost market capitalization value since early 2000. This dramatic loss in market equity value has dramatically slowed the flow of investment capital and capital risk-taking. Fortunately, consumer demand forces have

stayed strong enough through the first three quarters to prevent the economy from fizzling and slipping into a new recession.

This massive negative wealth effect from lost equity holdings resulted from an erosion of trust in businesses from revelations of numerous corporate financial misdeeds, accounting scandals and corporate slipping of earnings. Capitalism and globalization of industry now have a black eye. An era of market fundamentalism looks to be over.

The equity markets have to address curbing corporate excesses and recapturing investor confidence. The equity market will also be affected by the economic damage from the West Coast longshoremen's strike in October, prior to President George Bush gaining an injunction under the Taft-Hartley Act to stop it. How much remains to be quantified for 2003? This equity market volatility should continue through the end of the year and into 2003, but the trend is for improved market capitalization.

- A weakened dollar versus the euro. In January, 12 European countries parted with their national currencies to adopt the euro as a single common currency in the European Union. The euro has gradually strengthened against the U.S. dollar throughout 2002, and at one point in midsummer, it went above parity. There are plus and minus effects of

Repeat/ p. 12

## Grains, ingredients hinge on exports, South America

By GIL GULLICKSON  
Feedstuffs Correspondent

Visions of stratospheric grain prices of the mid-1990s likely flashed before the eyes of farmers and grain traders following August's U.S. Department of Agriculture grain production report.

After all, USDA's projected corn production of 8.89 billion bushels and projected soybean crop of 2.63 billion bushels were the smallest levels since 1995-96. Futures markets immediately reflected trader anxiety, as November soybean futures rocketed 47.75 cents/bu. and December corn futures jumped 22.5 cents/bu. during the week of the Aug. 12 report. The rally continued into September, when greater-than-expected corn and soybean yields, stumbling corn exports and an anticipated bumper South American soybean crop cooled markets.

So, what's ahead? Much hinges upon exports, domestic usage and South American weather in the next few months. Here's a preview of key market components.

### Corn's road

Corn markets have followed a path of predicted bumper production to production panic to comfortable production levels.

"With the anticipated corn acres back in late spring, we wouldn't have been surprised with a 10 billion-bushel corn crop," said Dennis Conlon, corporate purchasing manager for Ridley Inc., a Mankato, Minn.-based feed manufacturer. The Aug. 12 USDA report switched the bumper crop scenario into a short crop scare.

"Due to drought, hot weather and all the other horror stories, we had 1.1 billion bushels less than just a few months

earlier," said Conlon.

Thus, prices spiked in subsequent weeks. In early September, December corn futures hit a peak of \$2.88/bu., but by October, USDA had ratcheted up its production projection numbers to 8.97 billion bushels. Although one more USDA production report remains for Nov. 12, most traders expect few surprises.

"In the U.S., crop size numbers are getting really concrete," said Brian Basting, a commodity research analyst for Advance Trading, Bloomington, Ill. "The market is getting more comfortable with a 9.0 billion-bushel corn crop."

The bad news is that corn exports for the 2002-03 marketing year have fallen compared to 2001-02. In mid-October, export commitments for corn were the fourth lowest on record and far below seasonal expectations. Bill Tierney, Kansas State University extension crop marketing specialist, said,

"It isn't a good sign if exports stay as weak as they are," Basting added. China, which imported U.S. corn in the

ures flirted with the \$2.90/bu. range. USDA has projected a decline of 212 million bushels — or 3.6% — in feed and residual use in 2002-03 compared to 2001-02.

Low U.S. and world stocks remain corn's trump card for a post-harvest rally. As of Sept. 1, USDA tallied old crop corn stocks at 1.6 billion bushels, down 16% from 2001. Meanwhile, October USDA projections pegged global coarse grain ending stocks, which include corn, down slightly from September's 105.14 million metric ton forecast. During the 2000-01 marketing year, coarse grain ending stocks tallied 145.3 mmt.

"With the tightness in the world stock:use ratio, we could see an above post-harvest rally," Tierney said. However, a larger-than-expected USDA November production report could relieve some stock tightness, he said.

Although there is softness in corn's balance sheet, Tierney recommended that farmers retain ownership in some form — preferably futures or options — in order to take advantage of any



# FEEDSTUFFS

THE WEEKLY NEWSPAPER FOR AGRIBUSINESS

## Dairy group considers cow buyout; beef cutout sets new record high

By ROD SMITH  
Feedstuffs Staff Editor

DENVER, COLO. — For the beef cattle sector, the news was good last week as cattle supplies are tight and will stay tight longer than casual observers project, with cattle prices holding well even in the seasonally weakest center of the year, according to *Feedstuffs* sources interviewed in Denver.

However, for dairy producers, the news was a continuing nightmare last week as milk prices remained at the lowest levels in 25 years, leading to worries that the industry may be forced into a major rationalization in the near future. In response, the National Milk Producers Federation (NMPF) proposed a multi-part program to stabilize milk

production and pricing — one part of which could involve a dairy cow buyout.

The U.S. Department of Agriculture last Thursday revised its Class III milk price for the current marketing year a dime lower from last month to \$9.70/cwt., and important products were well under last year as expanding fluid milk production flows into manufacturing plants with no where else to go.

Butter prices were \$1.09/lb. in the cash markets at the Chicago Mercantile Exchange (CME) last Wednesday, more than 5% below last year. Barrel and block cheese were \$1.09 and \$1.12/lb. in the cash markets at CME last Thursday, both nearly 11% below last year.

NMPF's program involves addressing

additional checkoff-funded promotion on the demand side and responding on the supply side in three ways, NMPF communications vice president Christopher Galen told *Feedstuffs* last week. First, it would buy butter, cheese and other products and resell them abroad to decrease domestic inventory pressures, he said.

Second, it would provide incentives to producers to reduce milk marketing.

Third, it would buy and slaughter cows to reduce the national herd and, therefore, milk production. He emphasized that the cow buyout is just "one element" of the larger plan, which is called "Cooperatives Working Together" (CWT), and he said CWT would be a producer-funded and producer-run.

Markets/ p. 26

## Quarantine in place after END confirmed in Texas

By TIM LUNDEEN  
Feedstuffs Staff Editor

Movement of birds and poultry from five counties in Texas and New Mexico was prohibited last Thursday after laboratory tests completed late April 9 confirmed exotic Newcastle disease (END) had infected a backyard flock of 164 chickens near El Paso, Texas.

According to the Texas Animal Health Commission (TAHC), state and federal animal health regulatory officials destroyed the flock early last week but were concerned that END may have spread to other poultry and birds in the

area. Therefore, TAHC quarantined El Paso County, and the New Mexico Livestock Board quarantined Luna, Dona Ana and Otero counties in New Mexico.

"As of Wednesday evening (April 9), infection has been confirmed only in El Paso County," explained Dr. Bob Hillman, Texas state veterinarian and executive director for TAHC. "However, the five counties quarantined in Texas and New Mexico are considered to be a trade area in which there is significant movement of birds and poultry. State and federal authority is being

END/ p. 5

## Groups in EU willing to pay reform costs only once

By IAN ELLIOTT  
Feedstuffs Correspondent

In a development sure to upset strategists in the U.S. and Australia, European industry groups have bluntly told European Union governments in recent weeks that they are not willing to pay twice to reform the bloc's Common Agricultural Policy (CAP) — once when the 15-nation bloc settles internally on reforms to its current farm policy, and again to satisfy demands from Europe's trading partners.

The groups have told the European Commission and EU farm ministers that any deal on reforming the CAP as part of the now underway Midterm Review (MTR) directed by Agriculture Commissioner Franz Fischler must not be later topped up by additional cuts in tariffs and subsidies out of now stalled World Trade Organization talks.

"Any new reforms should only be decided after the present WTO negotiations and after the new member coun-

Reform/ p. 4

## USDA releases non-fat milk for feed aid

By SALLY SCHUFF  
Feedstuffs Washington Editor

WASHINGTON, D.C. — Supplies of U.S. Department of Agriculture surplus non-fat dry milk should be arriving at livestock feed distribution points in several drought-stricken states shortly.

The emergency federal feed supplies are the result of USDA's second dry milk program.

"Non-fat dry milk can serve as a high-quality source of protein to maintain foundation livestock herds in this critical time," Agriculture Secretary Ann Veneman said April 8 when she announced the program.

A similar \$150 million program last fall provided powdered milk to feed mills and gave vouchers to livestock producers to buy manufactured feed made with the dry milk. This year, however, USDA will distribute the powdered milk directly to affected states and tribes under memorandums of understanding. The states and tribes will handle distribution of the protein supplement directly to livestock producers.

The dry milk from government storage around the country is out of date and no longer intended for human consumption. It is slated to go to about 100 of the nation's most drought-stricken counties. "One of our most pressing concerns right now is the ability of pasture and grazing lands to support livestock herds," Veneman said in her announcement.

Eligible counties are listed at [www.usda.gov](http://www.usda.gov).

Eligible livestock include foundation herds (breeding and replacement stock) of beef cattle, buffalo, sheep and goats. While pork producers had expressed an interest in the program, have received only

### Inside News

#### Caucus formed

Several members of the House of Representatives announced last week they are forming a bipartisan food safety caucus. Page 3.

#### Meat to come from developing world

By the year 2030, two-thirds of the meat produced in the world will come from developing countries, according to a new study from the United Nations' Food & Agriculture Organization. Page 4.

#### ADM, EPA settle

The Department of Justice and EPA announced what they called a "landmark Clean Air Act" settlement with Archer Daniels Midland Co. that will cover operations at 52 plants in 16 states and cost the company an estimated \$340 million. Page 4.

#### French price fixing

France's largest farm group was among the organizations hit with a massive price-fixing fine by the European Commission earlier this month.

#### Iowa Select

#### reaches settlement

Iowa Select Farms announced that it has reached a settlement relating to a nuisance lawsuit that eliminated a \$32 million punitive damages award by a jury last fall. Page 7.

### Business

#### Johnsonville, PSF

#### form sausage venture

Johnsonville Sausage LLC and Premium Standard Farms Inc. have announced a joint venture, Oldham's LLC, to acquire the Oldham's sausage plant in Holton, Kan., from ConAgra Foods Inc. Page 6.

#### McDonald's has new plan

Jim Cantalupo, McDonald's Corp.'s chair and chief executive officer, said the company must become faster, leaner and more healthy and must focus more on getting better than bigger. Page 7.

### Dairy Nutrition & Health

#### Locomotion scoring

#### assesses lameness levels

Lameness in dairy cattle has received increasing interest recently because it can influence overall profitability (due to veterinary costs, premature culling and reduced milk production) and cow comfort. Page 8.

### Markets

#### Grain, oilseeds rise

#### following supply report

Feed grain and oilseed futures increased last week on the heels of a favorable USDA supply and demand report. Page 25.

#### Cattle supplies tight

Analysts have projected tight cattle

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En el S. XIX se produce una fase de gran optimismo tecnológico, que se prolonga hasta promediar el siglo pasado, cuando las preocupaciones ecológicas hacen preguntarse sobre ventajas y amenazas de la tecnología. El uso del agua ha estado desde entonces bajo escrutinio, por lo cual las empresas creadoras de tecnología de riego han tenido que ser cuidadosas en su oferta.

La tecnología del plástico ha venido en su auxilio, creándose los modernos sistemas de riego por goteo, los más modernos de todos basados en plástico,...

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- 14 El control de la condensación en invernaderos**

El control climático de los invernaderos se centra habitualmente en la regulación de los niveles de temperatura.

*A. Perales, A. Perdignes, J. L. García, J. I. Montero, A. Anton*



- 30 Cultivo de Iris para flor cortada**

En la actualidad, es posible cultivar y hacer florecer los iris durante todo el año debido a las nuevas tecnologías de preparación y conservación.

*J. C. M. Buschman*

La Revista Horticultura es una publicación plural y acoge en sus páginas las colaboraciones de autores referidos a temas de tecnología hortícola de los cultivos intensivos relacionados con las frutas, hortalizas, flores y plantas ornamentales y los de opinión referentes a la profesión. En todos los casos de los textos recibidos, la redacción se reserva el derecho de extraer, resumir, complementar y/o separar parte de la información para la elaboración de los artículos.

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La prospectiva puede ser una herramienta útil para ayudar a los países candidatos a que diseñen estrategias adecuadas para los años próximos, que les permitan hacer frente a los múltiples y complejos desafíos del cambio organizativo y estructural que supondrá su integración en la UE.

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08 MAYO 2003

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# Newsletter

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## Los futuros ciudadanos de la UE respaldan los objetivos de la PAC

Dos terceras partes de los ciudadanos de los países que pasarán a formar parte de la Unión Europea en 2004 creen en la reforma de la política agrícola común (PAC). Según los resultados de una nueva encuesta del Eurobarómetro (1), un 67 % de los ciudadanos de los países candidatos a la adhesión están de acuerdo con que la ayuda financiera de la Unión Europea (UE) se destine en menor medida a la subvención de los productos agrícolas y en mayor medida al desarrollo y la protección de la economía rural y a la ayuda directa a los agricultores. Según pone de manifiesto la encuesta, publicada el 8 de marzo de 2003, casi nueve de cada diez futuros ciudadanos de la UE cree que las prioridades de la PAC deberían ser proveer alimentos sanos y salubres y mantener y mejorar la vida en las zonas rurales.

La encuesta se realizó sobre una muestra representativa de las poblaciones de trece países: los diez cuya adhesión a la UE está prevista para 2004 (Chipre, Eslovaquia, Eslovenia, Estonia, Hungría, Letonia, Lituania, Malta, Polonia y la República Checa), además de Bulgaria, Rumanía y Turquía. Los resultados de la encuesta son, a grandes rasgos, similares a los de las encuestas realizadas entre los ciudadanos de la UE en 2001 y 2002.

Una de las principales diferencias entre esta última encuesta y las llevadas a cabo recientemente en la UE de los Quince es que los habitantes de los futuros Estados miembros están mucho más convencidos que los de la UE de los Quince de que uno de los principales cometidos de la PAC debe ser sostener la renta de los agricultores. Asimismo, el papel de la PAC en lo que respecta a la protección de la vida rural, la diversificación de los productos y la reducción de las disparidades de prosperidad rural entre las distintas regiones encuentra mucho más apoyo entre los ciudadanos futuros que entre los actuales.

Existen importantes variaciones entre los futuros Estados miembros. En Eslovaquia, la principal fuente de inquietud reside en las cuestiones públicas que las políticas europeas pueden abordar. Los ciudadanos de otros países, como Chipre, Estonia, Rumanía y Turquía, creen que las políticas agrícola y rural deben destinarse esencialmente a la obtención de beneficios individuales (comida más sana, protección del medio ambiente, adaptación de la producción a las necesidades de los consumidores o fomento de la producción ecológica). En los demás países, los

encuestados esperan que las políticas defiendan en igual medida el bienestar de los agricultores y los intereses de los ciudadanos. En las zonas rurales, se registran muchas menos variaciones entre los distintos segmentos demográficos de la sociedad: es mucho más probable, por ejemplo, que los ciudadanos esperen que las políticas agrícolas de la UE se dediquen más a los problemas de los agricultores que a los de la sociedad en general.

En apariencia, los resultados presentan algunas contradicciones. Los futuros ciudadanos de la UE, especialmente los de la República Checa y Eslovenia, temen que la PAC no consiga sus objetivos y resulte desfavorable para los agricultores. No obstante, un 69 % de los encuestados espera que la adhesión a la UE genere efectos positivos o muy positivos para las explotaciones agrarias. Los ciudadanos de la UE de los Quince parecen tener una mayor confianza en la capacidad de la PAC para ayudar a los agricultores, aunque opinan que el nivel de asistencia debería ser más limitado.

Es posible que el motivo de estas anomalías resida en la falta de información. No hay duda de que pueden hacerse muchos más esfuerzos por informar a los ciudadanos de los nuevos Estados miembros acerca del significado y los objetivos de la PAC, pues su actual nivel de conocimientos a este respecto es bajo. Los mejor informados son los polacos (un 36 % de los cuales conocen la PAC) y los eslovacos (31 %) pero, en promedio, sólo uno de cada cinco ciudadanos (20 %) afirma haber oído hablar de la PAC, y la mitad de los ciudadanos de los futuros Estados miembros (49 %) afirman no haber oído hablar nunca de las políticas y actividades agrícolas de la Unión Europea.

La Comisión está subsanando ya esta deficiencia informativa. De acuerdo con un Reglamento aprobado en 2000 (2), se dispone de fondos comunitarios para una amplia campaña informativa sobre la PAC destinada a los Estados miembros existentes, los Estados miembros futuros y otros países. La UE cofinancia además ciertos programas de información organizados por asociaciones de agricultores y de fomento del desarrollo rural, así como por asociaciones de consumidores y de protección del medio ambiente. Asimismo, la UE toma parte en proyectos de las autoridades públicas, los medios de comunicación y las universidades.

Pregunta:	Si (futuros Estados miembros) (%)	Si (EU-15) (%)
¿Debería la UE utilizar su política agrícola para...		
...asegurar que los productos agrícolas son sanos y salubres?	88	90
...favorecer y mejorar la vida rural?	88	77
...garantizar rentas estables y adecuadas a los agricultores?	86	77
...fomentar el respeto del medio ambiente?	84	87
...ayudar a los agricultores a adaptar su producción a las expectativas de los consumidores?	84	80
...proteger las pequeñas y medianas explotaciones?	83	81
...defender los intereses de los agricultores en sus relaciones con los intermediarios y los distribuidores?	81	69
...otorgar una mayor competitividad a la agricultura europea en los mercados mundiales?	80	77
...fomentar la diversificación de los productos y las actividades agrícolas?	80	73
...reducir las disparidades de desarrollo entre regiones?	80	72
...proteger los productos agrícolas europeos?	78	73
...fomentar los métodos de producción ecológica?	69	72

(1) El informe completo del Eurobarómetro puede consultarse en la dirección [http://europa.eu.int/comm/agriculture/survey/ce/index\\_es.htm](http://europa.eu.int/comm/agriculture/survey/ce/index_es.htm).

(2) Reglamento (CE) nº 814/2000 del Consejo, de 17 de abril de 2000.

# Nutrition Reviews®

Volume 61, Number 1, January 2003

## Lead Review Article

### 1 Soy Isoflavones: A Safety Review

Ian C. Munro, Ph.D., Melody Harwood, B.Sc., Jason J. Hlywka, Ph.D., Alison M. Stephen, Ph.D., John Doull, Ph.D., M.D., W. Gary Flamm, Ph.D., and Herman Adlercreutz, Ph.D.

*Soy isoflavones have been a component of the diet of certain populations for centuries. The consumption of soy generally has been considered beneficial, with a potentially protective effect against a number of chronic diseases; because of their estrogenic activity, however, negative effects of isoflavones have been postulated. This review examines the literature associated with the safety of soy isoflavones, including dietary soy isoflavone exposure data of populations with high soy intakes, human studies in which soy protein or isoflavones were provided, and toxicologic studies investigating the potential genotoxicity, carcinogenicity, and reproductive and developmental toxicity of soy isoflavones. Whereas results in some studies are limited or conflicting, when viewed in its entirety, the current literature supports the safety of isoflavones as typically consumed in diets based on soy or containing soy products.*

## Brief Critical Reviews

### 34 Not All Injury-induced Muscle Proteolysis Is Due to Increased Activity of the Ubiquitin/Proteasome System: Evidence for Up-Regulation of Macrophage-associated Lysosomal Proteolysis in a Model of Local Trauma

*A characteristic response to injury is a dramatic loss of skeletal muscle protein owing to increased muscle protein breakdown. Over the past decade, numerous studies have indicated that upregulation of the ubiquitin-proteasome system is a common mechanism underlying such injury-induced muscle proteolysis. However, a recent study using a single-impact trauma to the gastrocnemius muscle found that, although the rate of muscle proteolysis was dramatically increased, the ubiquitin-proteasome system was not involved. Rather, an increase in lysosomal activity, through infiltration of the damaged tissue by mononuclear macrophages, is responsible for the high rates of protein breakdown.*

### 38 Current Directions in Hemochromatosis Research: Towards an Understanding of the Role of Iron Overload and the HFE Gene Mutations in the Development of Clinical Disease

*Since the discovery of a candidate gene (HFE) thought to be involved in the development of hereditary hemochromatosis, there has been much interest in the potential use of genetic testing as a screening tool for the disease in the general population. However, a recent study suggests that less than 1% of subjects who are homozygous for the gene mutations will go on to develop the full-blown disease of hereditary hemochromatosis, historically termed "bronzed diabetes." The study also suggests that homozygotes have no higher risk of mortality or of any clinically significant morbidity than normal control subjects. This conclusion contradicts earlier findings that linked iron overload and HFE mutations to a number of devastating diseases, including cardiovascular disease, diabetes, and cancer.*

### 43 Calendar



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# Nutrition Reviews®

Volume 61, Number 2, February 2003

*Lead Review Article*

45 **Health Implications of Iron Overload: The Role of Diet and Genotype**

Anne-Louise M. Heath, Ph.D., Susan J. Fairweather-Tait, D.Sc.

*The relationship between high dietary iron intake, mutations of the HFE gene, and iron status, and their effects on human health are reviewed. Prolonged high dietary intakes of iron are unlikely to result in iron overload in the general population. Homozygotes for the C282Y mutation of the HFE gene have elevated body iron levels. Heterozygotes have normal iron stores but some may be at increased risk for cardiovascular disease. There is no convincing evidence that elevated iron status increases the risk of coronary heart disease or type 2 diabetes, but high iron intakes may increase the risk of colorectal cancer. The dietary levels of iron associated with health risks in different HFE genotypes must be determined.*

*Special Article*

63 **Soluble Adhesion Molecules: Surrogate Markers of Cardiovascular Disease?**

Mohsen Meydani, D.V.M., Ph.D.

*Expression of adhesion molecules on the surface of endothelial and immune cells is important for the interaction between immune and endothelial cells during the inflammatory process. Several of these adhesion molecules have been identified and are believed to be important in the pathogenesis of atherosclerosis. The soluble forms of adhesion molecules are shed from cell surfaces and released into blood circulation; their measurement may have use as markers in predicting cardiovascular disease. Experimental and some clinical data have indicated that reducing expression of some adhesion molecules is another mechanism by which dietary fats such as n-3 polyunsaturated fatty acids and oleic acid, as well as vitamin E and other antioxidants found in fruits and vegetables, may lower the risk of cardiovascular disease.*

*Brief Critical Reviews*

69 **Antioxidant Vitamins E and C and Risk of Alzheimer's Disease**

*Age-related neurodegenerative disorders are increasing rapidly. Alzheimer's disease is the most common cause of dementia associated with aging. A recent study has examined the role of vitamins E and C in a prospective epidemiologic cohort study and suggested that they might protect against Alzheimer's disease.*

73 **The Relationship between Obesity and Breast Cancer Risk and Mortality**

*Obesity is an established risk factor for postmenopausal, but not premenopausal, development of breast cancer. Evidence for a positive association between obesity and breast cancer mortality is mounting. Avoiding adult weight gain and maintaining a healthy body weight may contribute importantly to decreasing breast cancer risk and mortality, especially in postmenopausal women.*

76 **Moderate Changes in Weight and Physical Activity Can Prevent or Delay the Development of Type 2 Diabetes Mellitus in Susceptible Individuals**

*The prevalence of type 2 diabetes mellitus is rising significantly, paralleling the increase in obesity observed around the world. Diabetes is a progressive disease that frequently results in serious complications including retinopathy, neuropathy, nephropathy, and cardiovascular disease. Early detection and treatment of hyperglycemia, the cornerstone of diabetes, can decrease the incidence of these sequelae. Moderate changes in both body weight and physical activity improve the control of hyperglycemia associated with diabetes. Recent studies indicate that similar lifestyle changes can help to prevent or delay the onset of diabetes in people at risk of developing this disorder.*



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# Nutrition Reviews®

Volume 61, Number 3, March 2003

## Lead Review Article

### 81 Triple Trouble: The Role of Malnutrition in Tuberculosis and Human Immunodeficiency Virus Co-infection

Monique van Lettow, M.P.H., Wafaie W. Fawzi, Dr.P.H., and Richard D. Semba, M.P.H., M.D.

*Worldwide, the number of individuals who are co-infected with human immunodeficiency virus (HIV) and tuberculosis is increasing greatly. The "triple trouble" of HIV and tuberculosis infection and malnutrition may put those infected at greater risk than those with any of the three conditions alone. Further investigation is needed to evaluate the prophylactic and therapeutic potential of nutritional interventions for co-infection with HIV and tuberculosis.*

## Special Article

### 91 Probiotics: Considerations for Human Health

Mary Ellen Sanders, Ph.D.

*Evidence for the role of probiotics in maintenance of health or prevention of disease is mounting and is supported in some cases by blinded, placebo-controlled human trials. Today, in an era of antibiotic-resistant pathogens and other looming microbial threats, the value of prevention of infection is recognized. Probiotics may play an important role in helping the body protect itself from infection, especially along the colonized mucosal surfaces of the gastrointestinal tract. Probiotic products are available in many different forms worldwide, including pills, powders, foods, and infant formula. In some cases, general health claims are made that cannot be substantiated for the specific strains and levels being used and consumers must therefore beware.*

## Brief Critical Reviews

### 101 Ghrelin: Update 2003

*Ghrelin is a recently described peptide hormone that is secreted by endocrine cells in the gastrointestinal tract. Although its initial discovery was as a novel growth hormone secretagogue, it has been found to regulate feeding behavior by modulating expression levels of orexigenic peptides in the hypothalamus. Ghrelin has been implicated in the coordination of energy balance and weight regulation, and its dysregulation may be important in obesity. Ghrelin also has several other physiologic actions besides potential regulation of food intake that are described in this brief review.*

### 104 Body Mass Index and Mortality in Asian Populations: Implications for Obesity Cut-points

*Investigators have questioned whether body mass index (BMI, kg/m<sup>2</sup>) cut-points for obesity used in the United States and Europe are appropriate for Asian countries. A recent study examined the association between BMI and mortality in a population-based cohort of Japanese men and women. These and other results did not indicate a need for lower cut-points in Asians.*

### 107 Prevalence of Vitamin D Insufficiency in Canada and the United States: Importance to Health Status and Efficacy of Current Food Fortification and Dietary Supplement Use

*Several recent studies have identified a surprisingly high prevalence of vitamin D insufficiency in otherwise healthy adults living in Canada and the United States. Most striking are the effects of latitude, season, and race. Also noteworthy is that dietary vitamin D is not reaching the population in greatest need, nor is it very protective against insufficiency. Fluid milk, as the predominant vehicle for vitamin D fortification, is apparently not very effective in staving off vitamin D insufficiency in adults in all populations at all times of the year.*

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▶ LE BILLET



Julien Diependaele

**Plus d'hommes et des moyens**

La Charte ovine, l'un des thèmes de l'Assemblée générale de la FNO, axe la relance du métier d'éleveur sur la professionnalisation de l'élevage ovin. Préparer demain c'est inves-

tir aujourd'hui dans l'appui technique, le matériel, les bâtiments. Les Pouvoirs publics sauront-ils accompagner un tel mouvement ? A moins qu'ils ne préfèrent laisser échapper nos

euros français pour acheter des viandes ovines produites hors de l'Hexagone ! Plus que jamais les éleveurs doivent démontrer leur volonté de consolider ensemble leur filière.

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## FOCUS

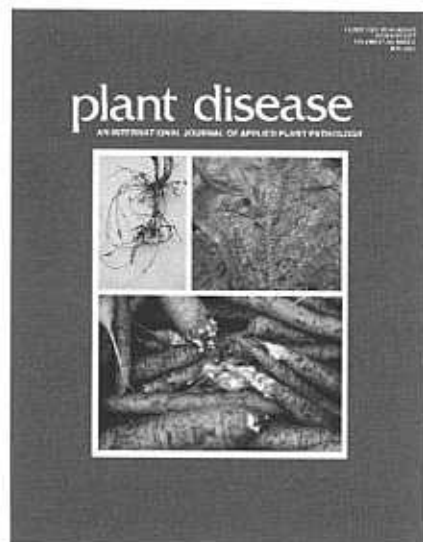
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## COVER

(Clockwise from upper left): Powdery scab galls on roots and stolons of potato caused by *Spongopora subterranea* (courtesy W. T. Cobb); bacterial leaf spot of summer squash caused by *Pseudomonas syringae* pv. *syringae* (courtesy D. B. Langston, Jr., see page 600); Sclerotinia rot of carrot caused by *Sclerotinia sclerotiorum* (courtesy C. Kora et al., see page 456).

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Cover picture: The picture shows the distribution map of indole-3-acetic acid in *Arabidopsis thaliana* (L.) Heynh. at the flowering/fruiting stage. This is part of a multiplex analysis of several acidic phytohormones by a newly developed, fully quantitative and highly sensitive GC-MS/MS procedure (see A. Müller, P. Dächting, E.W. Weiler, this volume, pp 44-56).



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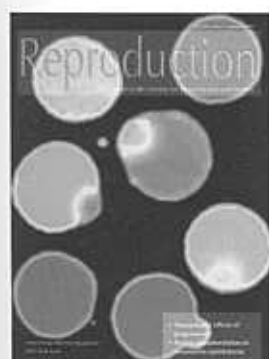
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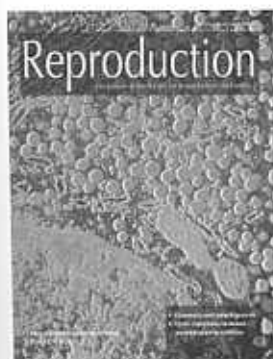
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APRIL 2003

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pituitary cell showing secretion  
of gonadotrophic hormones.  
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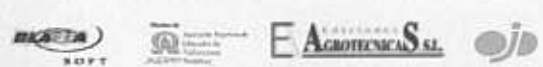
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