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Dateline
April 3 2006

Weekly Tribune

The trade newsletter of the British & European pig markets • 01379 669157

Italy builds label barrier

Italy is making it increasingly difficult for foreign food products to enter its markets. In July 2004, the Italian parliament passed a law requiring food processors to display country of origin labelling for ingredients used in their products (where multiple ingredients are used only the 'prevalent ingredient' needs to be listed). Now the Italians are using the

same device to complicate life for importers of tomato paste. A new law means processors must indicate on the label both the country of origin and the geographical area where the product was sourced. Why doesn't someone in the pig industry bounce this idea off the Rt Hon Margaret Beckett and let *Tribune* know the outcome?

UK 'on hold' while Europe moves on

It's been a week of talk. There was talk of militant action from the reformed British Pig Industry Support Group. Apparently new style Thursday night shopping trips in Oxfordshire, Nottinghamshire and Yorkshire were being seriously considered but nothing came to fruition.

There was also union talk of week-long industrial action from April 3 of Meat Hygiene Service inspectors, matched by talk that response to strike action would be at best patchy. Meanwhile for the second week running, UK beef prices lifted because of the Argentinian government's realisation that its countrymen must be able to buy home-produced beef at

affordable prices. Those looking for action in the pig markets would not have got over excited by the price movements of UK spots. Cull sows dipped from their recent highs and demand for cutters was at best variable. However, pig sellers reported more interest in bacon pigs.

Processors, not surprisingly wanted to pay as little as possible, but some much-needed orders brought up to 103p/kg although supply availability limited the opportunity for sellers making the most of this blip of relative ecstasy.

Speaking of markets, Sir Ken Morrison, chairman of William Morrison Supermarkets, got the financial world buzzing with his

Tribune PIG PRICES

Average calculated 18.00 hrs Friday

TSBA 101.07 +0.83
(GB Spot Baconer p/kg)

TSCA 106.06 +0.58
(GB Spot Cutter p/kg)

TEMA 100.28 +1.50
in pence
(Euro Mainland Average)

Tribune

EXTRA

Pulling together...
See page six



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► **Markets...continued from page one**

own bit of trading. It seems that on 24 March he sold 227,000 worth of shares at 200p/share. That brings his personal stake down to a paltry 270 million shares and ownership of around ten per cent of the company. The impact on the City brought Morrison shares slightly off the boil.

■ The European average price has reached its highest point since August last year although there was just a touch of uncertainty in some key markets as the week closed. *Tribune's* mainland average, given a helping hand by a rising euro, topped 100p/kg for the first time for many weeks mostly helped by gains in those two exporting countries closest to the UK, Denmark and Holland.

Spain also seems comfortable with current trading but in Germany and France pressure was applied by processors to bring the prices back although producers seem to remain confident that the current return to profitability is sustainable and may well result in further increases when the holiday season gets into full swing. Confirmation of another case of classical swine fever in Germany's Rhineland led to the imposition of movement controls by the EU Commission and tended to unsettle trade. Any further spread of the disease could put all important export trade at risk and deal a damaging blow to producer returns.

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What they say...

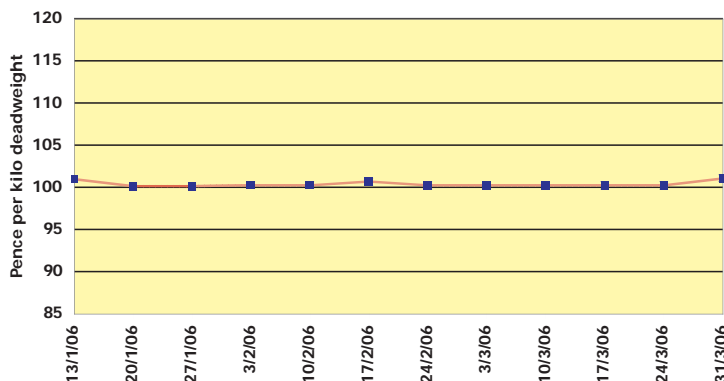
"I was disgusted when I read reports this morning. I find it sickening that this sort of thing is going on in full view of the Office of Fair Trading. In my view this is a clear abuse of power. Enough is enough, it must stop. This is just the latest of a series of examples demonstrating what is happening in the supply chain on an almost daily basis. This is symptomatic of the one dimensional approach to competition policy that is adopted by the OFT in relation to the grocery market. Unchecked, this situation is worsening as competition becomes more aggressive." **NFU president, Peter Kendall on reports that ASDA is demanding upfront payments from suppliers**

"Failing to recruit at the right time causes boardroom unrest and unsettles investors. However, too many businesses fall into the same trap. This particular appointment (chief executive) at Morrisons has been painfully slow and hasn't been helped by Sir Ken's recent announcement that he hopes to be with the company for another two to three years. The whole affair highlights the importance of succession planning and the need for a smooth transition between senior management personnel." **Specialist retail headhunter John Wakeford on boardroom battles at Morrisons**

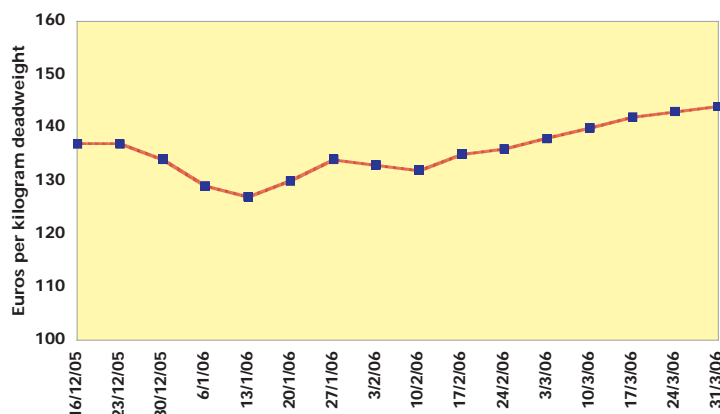
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This week's prices - UK and Europe
Calculated 18.00 hours Friday

TRIBUNE SPOT UK BACON PIG AVERAGE



TRIBUNE EUROPEAN MAINLAND AVERAGE



Tribune
European Pig Prices

Basis - last available quote in Euros - deadweight

Country	Euro/kg	P/kg	+/-
GB Bacon Spot	1.45	101.07	+0.83
GB Cutter Spot	1.52	106.08	+0.58
Holland	1.44	100.28	+2.88
Germany	1.48	103.07	-1.24
Belgium	1.46	101.67	+0.78
France	1.50	104.46	+0.15
Denmark	1.22	85.00	+2.79
Spain	1.51	105.16	+1.54
GB Cull Sows (export spec)	1.19	83.17	-1.58

TEMA (Tribune Euro Mainland Average): 1.44 (+0.01)

TEMA in pence: 100.28 (+1.50) Euro/£: 69.64p (+0.56)

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The British Society of Animal Science met this week at York University. Tribune brings its readers a flavour of the papers

Enhanced pork could get to heart of health

Health benefits from more animal derived foods in the human diet.

It's only days since a respected medical researcher cast doubts on globally held beliefs about human health benefits arising from human foods enriched with omega-3 fatty acids. Nevertheless, a research paper from Given and Gibbs working at Reading University flagged-up the scope for supplying polyunsaturated fatty acids (PUFAs) by increasing their concentration in foods of animal origin. Most researchers recognise that current intake of n-3 PUFAs by the UK adult population is well below the optimum level. This is because 73 per cent of the population eats no oily fish. The shortfall could be made up by providing more n-3 PUFAs from animal derived foods.

Another paper from Reading University from Dr A M Minihane indicated that every one per cent reduction in saturated fatty acids in the human diet equates with an approximate three per cent decrease in the risk of cardiovascular disease. Currently, in the UK meat and meat products contribute 23 per cent, 22 per cent and 21 per cent of total fat, saturated fat and trans-fatty acids in adult diets. Dr. Minihane pointed out that a major challenge for those in animal production is to reduce saturated fatty acids and boost the polyunsaturated fatty acids ratio in meats and animal products. He suggested that meats have traditionally been considered a source of 'negative' fats and that emerging research is now pointing the way to produce meats with an enhanced fatty acid profile. Pigmeat products would be an ideal delivery mechanism.

Sodium butyrate improves piglet small intestine structure

Miller, Slade, Reynolds and Carroll working at Leeds University investigated feeding newly weaned pigs with varying levels of sodium butyrate with and without zinc oxide. However, in all instances sodium butyrate was associated with improved feed conversion efficiency and the researchers suggested that this arose because of enhanced villi at the start of the small intestine. In the trial an unprotected form of sodium butyrate had been used and this is known to breakdown rapidly in the small intestine. It seems reasonable to speculate that a protected form would dissociate more slowly and maintain its positive impact further down the intestinal tract.

Welfare benefit with silage

An experiment undertaken at the Agriculture Institute of Northern Ireland investigated the impact of feeding grass silage on the dynamic behaviour of weaned sows. When a 22 per cent dry matter grass silage was available from a rack, the weaned sows seemed more settled and they integrated better. They spent more time lying down in their kennels and less time undertak- ➤

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Comment and analysis

ing explanatory behaviour. This is just the kind of research result that makes pig farmers quip "I could have told them that!" Nevertheless, it's good to see some scientific measurements imposed on a practical course of action.

Pre-natal influence on meat quality

Myogenesis is the process whereby the numbers of muscle fibres are formed in pigs before they are born. The process stops by day 90 of gestation and it has a marked impact on the potential for lean meat production. Greater numbers of muscle fibres and increased fibre size are associated with more production of lean mass.

In-depth studies on this topic have been studied at Germany's Research Institute for the Biology of Farm Animals. Delegates at the BSAS conference were told that low birthweight pigs develop fewer muscle fibres in pre-natal myogenesis. The low birthweight pigs not only have poorer growth performance at slaughter, but they also have a lower lean percentage in the carcass. They also tend to produce large muscle fibres and poor quality meat. It was suggested that the genetic heritability of muscle fibre numbers and size were sufficiently high to warrant inclusion of these traits in genetic selection.

Catching'em young

Dinner ladies submitted healthy meal suggestions for the final of the School Chef of the Year competition. The *Daily Telegraph* provided an example of an interesting main course now enjoyed by pupils at Downsway Infant School in Oxted, Surrey. It is known as 'Pigs in Nasturtium' and comprises seared pork medallions dressed with watercress and feta salad and Mediterranean tomato coulis served with cream potatoes. Maybe Jamie Oliver followed the pig industry's lead.



Snout and About Tribune's global news review

Pork Direct?

The Meat and Livestock Trade Marketing Department (01908 844107) has produced a compact leaflet entitled *Selling Pork Direct to the Customer*. It deals with topics ranging from hygiene, storage of pork carcasses, curing bacon, packaging, labelling and consumer information. The latter helps consumers and budding butchers unravel the mysteries of the various cuts. Guidance about mail order sales spells out the need for strong insulated packaging and the hygiene rules set by the Royal Mail.

CSF re-emerges in Germany

The latest published report on classical swine fever indicates a new outbreak in the previously affected area of Haltern-am-See in North Rhine Westphalia. Thirty cases of the disease have been confirmed on a pig unit where there were 1,183 susceptible pigs. Fourteen pigs died from the disease and the rest were destroyed. ▶▶

What they say....

"Everybody in the chain is working together to ensure meat supplies are as close to normal as possible next week." **British Retail Consortium trying to reduce fears about more strikes by inspectors in the Meat Hygiene Service**

"It's interesting to see that the biggest step down is in creep and starter feeds. While it's also good to see the one per cent step down in grower and finisher feeds, further reductions are possible and this would see the biggest impact in terms of pig health, performance and the environment due to the high volume of feed and slurry involved."

Dr Mike Overend of Forum Bioscience commenting on protein levels and the company's survey which revealed that one in four UK pig farmers whose stock numbers will require an IPPC permit in January next year have yet to consider how the regulation will affect them

"It's the split between negative Britain, in which we appear to be under relentless attack from an increasing list of death-inducing ailments, and positive Britain, where life expectancy is rising at such a rapid rate that the pension system is on the brink of collapse."

Jeff Randall commenting in the Daily Telegraph about a new divide within the UK

"Though there is a new world out there, farmers must be efficient when it comes to production or they will lose out. We are starting from a strong economic position, now it's up to us to build a farming industry for the future. Producers must understand the supply chain and provide what it needs. Then they can be sure of getting a good return."

Clare Wise of the Red Meat Industry Forum speaking at a Women's Farming Union Conference



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Snout and About

Tribune's global news review

Improved movers

The US National Pork Board reckons it is saving the industry more than \$6 million a year by training truckers and anyone else involved in moving pigs. Up to 14,000 producers, drivers and handlers have so far been trained under the Trucker Quality Assurance scheme - and the results are paying off, according to Erik Risa, education programme manager for the NPB. Launched in 2002, TQA encourages "dedication to transporting and delivering the highest quality, safest product possible to remain competitive in US and world markets. By completing this programme, participants demonstrate their commitment to quality-assured pork transportation and delivery."

Labels luxury

An internet order for Tesco Value unsmoked bacon yielded a 250g pack costing just 74p. Now *Tribune* might have got this wrong but labelling initiatives were thought to be a big problem for supermarkets to implement. In this instance the front of the pack was emblazoned with the eye-catching declaration 'Produced using pork from farms operating to Tesco's livestock standards'. On the same virtual shopping spree, a request for some Tesco Finest bacon liberated a 300g pack of Finest unsmoked dry-cured sea-salted bacon. The eight rashers cost £2.48 in a much-labelled 'New Easy Open Pack' featuring the Little Red Tractor and QS Mark of Distinction. It's re-assuring to know that our leading supermarket takes traceability seriously and is committed to the extremes of product differentiation.

Asda's first

As March ebbed, Asda opened the doors of its first Asda Essentials store. The press was invited to its new store in Northampton prior to its opening. Seven similar stores are planned and will focus on 'cheap and cheerful' own-brand products. Meanwhile NFU President Peter Kendall expressed his dismay regarding reports in the national press that Asda intends to demand up-front payments from its suppliers.

Still wasting

In Canada, although PMWS appears to have eased slightly, it has led to mortalities ranging from 25 per cent to 40 per cent in some instances. Supply has been badly hit in Quebec and Ontario making competition with American producers more difficult. Meanwhile, in New Zealand, Chris Trengrove, chairman of the Pork Industry Board, has urged pig producers to upgrade biosecurity measures in an effort to curtail spread of the disease.

Show the difference

The European bodies representing agricultural organisations and co-operatives (COPA and COGECA) are seeking improved food labelling to differentiate between EU products which meet high European quality standards and those from third countries.

'Scarey' veg

The Vegetarian Society is running its national promotion week (May 22 - 28) under the slogan: *It's nothing to be scared of*. "As many recent press reports have proved, a vegetarian diet offers huge and life-changing health benefits, from lowered levels of obesity and cancer to a better sex drive," says a press release.

Weekly Tribune

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The UK pork supply chain: pulling together for consistency and quality

In my first article (February 27) I examined the mini revolution unfolding in the countryside and gave two examples of thriving food businesses whose owner/managers are enjoying their new roles as price makers rather than price takers.

Their success is due to a growing army of consumers who are prepared to pay more for food that has been grown locally and in many cases extensively. Indeed, some consumers when questioned believed that there was a direct relationship between price, safety and quality; the more they paid the better and safer the eating experience.

Such examples, however, represent a small proportion of food sales. The other 95 per cent of us operate in tough competitive supply chains where price is the key. Today, we don't just have to be competitive in the UK, we have to compete globally. The major retailers have global sourcing strategies that direct processors to parts of the world that can provide the same quality, though perhaps not the same welfare standards, for lower cost. These products are then imported to the UK, clocking up thousands of food miles - all to provide price conscious consumers with the value they demand.



Consistent quality is the key to consumer loyalty

*By Tim Rymer,
chairman JSR Genetics*

Actually this isn't strictly correct; competition between the supermarkets causes price deflation. Consumers are prepared to pay more, providing they are not able to buy cheaper elsewhere. This became apparent during food scares such as BSE, with chicken and pork benefiting. We will see it again if Avian Influenza lands on our shores. The media hysteria following the first fowl fatality will be disproportionate to the risk, causing consumers to switch to food they deem safer. Not that food scares are a way to improve our returns, far from it; they damage all food production, perhaps with the exception of organic which in being more expensive is seen as safer.

Identify goals

The global sourcing model will service the value end of the market; a market, UK producers should not bet their future on. We are disadvantaged competitively, with the gap between the UK and say Brazil or Chile so large as to be insurmountable. It is not enough to wait for the inevitable health/disease breakdown to shut down a global supply chain overnight. We must seek our own goals.

The farm shop examples give us the steer we need. The UK should focus on the premium end of the market, primarily through integrated supply chains. This means the end of the freedom loving individualist and organisations that don't add value to the supply chain. The relationship network is crucial to the success of farm businesses today - it is the new capital! Communication, management abilities and fairness will supplant simple shrewdness and working with others will replace going it alone.

Product traceability, strong quality orientation and a focus on the profitability of the whole production chain are competitive advantages against globally traded commodities. This means food with a story to tell that gives an excellent eating experience - every time.

Consistent quality is the key to consumer loyalty. It is widely recognised that nothing touches the consistency of Birds Eye peas. This is because Birds Eye work in partnership with the supply chain right back to selecting the right breed/variety of pea. Rigorous attention to detail pervades every stage of the supply chain. Short cuts or compromises are shunned. The result is that Birds Eye peas command a substantial premium in the market place.

This obsession with quality and attention to detail throughout the supply chain are key aims for the UK pork chain and can only be achieved by all parts of the supply chain working together and sharing the value. This demands transparency and sharing confidential information in an environment of trust - not easy for an industry so used to mistrust. Wherever possible, the integrated supply chain should be based on same genetics, same feed and same production system. Without these three pillars it is difficult to build consistency.

The whole chain should be documented in a blue print and rigorously audited with the guiding principle being: 'Is it adding value to the consumer?' Quality assurance schemes have got a bad name because, ignoring the consumer, they focus instead on regulation that is out of all proportion to the risk. This is not the role of an audit in an integrated supply chain.

Award winning

The Cranswick Tendalean programme is an award-winning integrated supply chain supplying Sainsbury's with consistent high quality pork products from JSR Tendalean boars and Gold X sows. The demand for Tendalean pork is exceeding expectations but Cranswick recognise that unless the product is continuously improved they run the risk of being caught by their competitors. All partners in this supply chain must work together to cut out variables that may affect the consistency. One sure thing is that any competition based on quality and consistency is likely to come from a UK-based integrated supply chain, rather than a globally sourced supply chain.