

Egg Industry

News for the Egg Industry Worldwide

WATT

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Grain Prices Will Decline...Eventually

More acreage and higher yields are the keys to lower feed prices.

ETHANOL PLANTS COMING ON LINE Between Now and the end of 2008

State	# of Plants	Gallons of Annual Capacity (Mil)	Additional Bushels Needed (Mil)*	Total Bushels Needed (Mil)*	Est. 07 Corn Production	08 Capacity /07 Production
Illinois	5	0	0	321	2,314	14%
Indiana	5	0	0	175	1,003	17%
Iowa	15	0	0	722	2,441	30%
Minnesota	6	0	0	244	1,185	21%
Nebraska	4	0	0	418	1,458	29%
Ohio	7	0	0	0	542	0%
S. Dakota	2	0	0	228	556	41%
Other	27	5,817	2,115	2,770	3,668	76%
Total	71	5,817	2,115	4,879	13,168	37%

*Ethanol yield 2.75 gal/bu.

When added to the existing 127 plants, total ethanol production will exceed the 2015 mandate by the end of next year. Chart courtesy of Brock Associates, 2008.

By Sue Roberts, Executive Editor

Corn, already in the upper \$4/bu. level, is likely to reach at least \$5 per bushel on the farm this year. "For most of the poultry operations, add 50 cents to that and that is the base line – high priced corn," predicts Richard Brock, owner and president of Brock Associates, agricultural advisory firm.

The culprit: oil. Brock, who spoke at the International Poultry Expo in Atlanta, says that the old rule of thumb has hit home – if the price of a commodity is too high for too long, some-

one will find a way to produce more of it, use less of it, or use something else.

Part of that "something else" is ethanol that is diverting corn and other grain away from feed, playing havoc with price projections and creating a

new plateau for the grain industry. The result is uncertainty as to where grain prices are headed and how they will ultimately affect food industry prices.

Plant Proliferation

Fifteen million gallons of the Energy Bill's mandated 36 million gallons of ethanol by 2015 is to come from grain ethanol, or corn. This directive has prompted a growing crop of ethanol plants across the United States.

Brock estimates that there are 127 plants currently operating, each producing an average of 57 million gallons of ethanol annually. Seventy-one plants are under construction, with an anticipated average capacity of 82 million gallons each, which will collectively require 4,879 million bushels of corn.

Plants scheduled to be operational by the end of this year include five in Illinois, five in Indiana, 15 in Iowa, six in Minnesota, four in Nebraska, seven



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Grain Prices Will Decline... |

in Ohio, two in South Dakota, and 27 scattered throughout the rest of the country. Another estimated 109 plants have been proposed.

per month — corn pulled from western Nebraska. Corn availability and its cost for these plants will be one issue, availability of rail cars and the infra-

slow, due in part to the nearly doubled cost of building ethanol plants. Cost of a 100 million gallon plant was about a dollar per gallon, or \$100 million, three years ago. Today, that cost is closer to \$200 million for the same capacity plant. Finding financing for these projects is becoming increasingly difficult. The rising cost of feedstock also comes into play. Brock points out, "I've actually seen five ethanol plants file for Chapter 11 because of the high-priced corn."

Banks were ready and willing to loan up to 75 percent of construction costs for ethanol plants three years ago. For new plants, with the breakeven on a steady increase largely due to the cost of corn, it's a different deal.

Acreage and Yield

Brock's good news for the industry is that there should be plenty of corn to get the egg industry through this year thanks to the big carryover. The problem appears when the industry looks forward to acreage available for corn for 2008-09. The tug-of-war between feed, ethanol and exports calls for more acres with higher yields.

"I think we'll end up somewhere between 90-91 million acres getting planted (his estimate is 156 bushel yield). With only 90 million acres getting planted, there is a problem. If we planted only 89 million acres and had the same corn yield we had in 2007 (151 bushel yield), we've got an absolute disaster — you would be looking at \$6-plus corn," says Brock.

Fortunately, he projects no such catastrophe, "We'll be somewhere between my average and a 162 yield. Carryover jumps to 1.8 million bushels

**ANNUAL ETHANOL CAPACITY (including plants under construction)
AS A % OF 2007 CORN PRODUCTION**

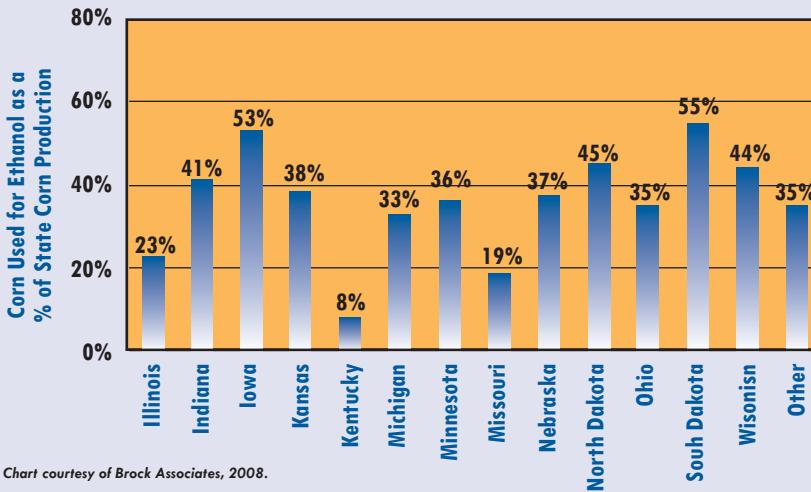


Chart courtesy of Brock Associates, 2008.

Plants currently under production will require and estimated 4,879 million additional bushels of corn, bumping up the percentage of corn used for ethanol across all states.

As logic seems to dictate, the bulk of the plants are located within the heart of corn country to minimize shipping of the raw material. But locations like Syracuse, N.Y., Niagara Falls, and states in the Far West are also seeing new construction. With 80 percent of ethanol used on the coasts, the theory is that it is more efficient to haul the corn to the coasts for processing than to move the final product.

If the additional four plants scheduled in California begin production, Brock estimates that they will require 11 additional 100 rail-car units of corn

structure for its transport will be another. Brock's prediction, "Some of these plants won't operate."

More than Enough

A year from now, when the plants under construction add their production to the current ethanol output, the United States will achieve the mandated ethanol production level for 2015. If proposed plants are built, their added production will put the nation past the mandated level by an estimated 32 percent.

Proposed plant construction may,

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and you've got a corn market that is a buck and a half overpriced right now, but we're not going to know that probably until September."

Bearish News

Most of the market surprises, says Brock, will come from the bearish side, not the bullish side, "They will come from ethanol usage and, for once now, we are going to see more customer resistance."

Brock's price-lowering surprises range from governmental actions to scientific discoveries, including:

- Possible expiration of the 54-cent tariff on imported ethanol (valid through January 2009). He says, "If you had asked me three months ago if this would be renewed, I would have given you a 95 percent yes – as long as we have an electoral system electing political candidates, rural votes in Illinois, Indiana and Nebraska count for a lot. But with the building pressure on in Washington, D.C. about what ethanol is doing to the price of corn, I am

U.S. CORN SUPPLY AND DEMAND 2008/09 Bullish vs. Bearish Scenarios

	Bullish Scenario	Average	Bearish Scenario
ACREAGE (Mil. Acres)			
Planted Area	89.0	90.0	92.5
Harvested Area	81.0	81.9	84.2
Yield	152.0	156.0	162.0
SUPPLY (Mil. Bushels)			
Beg. Stocks (Sept 1)	1,438	1,438	1,438
Production	12,312	12,776	13,636
Imports	10	10	10
Total Supply	13,760	14,224	15,085
USAGE (Mil. Bushels)			
Feed & Residual	5,500	5,850	5,800
Feed/Seed/Ind	5,445	5,370	5,270
Ethanol for Fuel	4,075	4,000	3,900
Domestic Use	10,945	11,220	11,070
Exports	2,300	2,300	2,200
Total Use	13,245	13,520	13,270
STOCKS (Mil. Bushels)			
Ending Stocks (Aug 31)	515	704	1815
Stocks/Use	3.90%	5.20%	13.70%
Farm Price (\$/Bu)	\$5.50-6.85	\$4.50-5.50	\$4.00-4.75

Brock Associates expects most of the market surprises to be on the bearish side, bringing corn process down. Chart courtesy of Brock Associates, 2008.

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| Grain Prices Will Decline... |

not so sure this will be renewed.”

• Genetic improvements continue to increase corn yields. Brock adds, “A 10 bushel increase per acre would solve a

would allow pork and poultry to digest DDGs, potentially offsetting a large portion of corn needed for feed.

• Six to 10 million acres of Conser-

as ocean windmill farms will go up.

Still, the year ahead will be challenging. Among Brock’s predictions for 2008: 1) grain prices will decline from current high levels; 2) for the first time in many years, poultry production will likely decline; and 3) in 2009, food prices will rise significantly, bringing back strong profits.

“In 31 years, I’ve never seen the entire economic outlook so volatile and so much change taking place,” Brock says. “Exciting times.” **EI**

Article developed from comments made during Richard Brock’s presentation, Impact of Feed and Fuel on Poultry Production, during the U.S. Poultry & Egg Association Educational Program held during the International Poultry Expo.

For more information contact Richard Brock at Brock Associates, (800) 558-3431, rabrock@brockreport.com, www.brockreport.com,

How to React?

Brock offers three points for consideration:

✓ **Don’t get bullish. Corn producers should sell; buyers should put their purchases off as long as they can. There should be no shortage this year.**

✓ **Delay the purchase of fuel and fuel-related products for as long as possible.**

✓ **“Batten down the hatches.” Grain prices will soften.**

lot of problems.”

• Cellulose ethanol is coming. This alternative feed stock may replace some corn usage in three to five years.

• An enzyme is in development that

vation Reserve Program (CRP) land will become available for production.

• Sharp decline in energy prices. Oil usage will go down and development of new alternative energy sources such

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WATT Launches EcoAgri.Biz

WATT, Rockford, Ill., the publisher of *Egg Industry*, has launched a new publication, *EcoAgri.Biz*, to help egg and other livestock producers cut costs while reducing their carbon emissions.

“Our mission is to help agribusiness managers increase profitability through effective environmental stewardship,” says Bruce Plantz, WATT vice president of content. The digital publication, launched in January, has included such articles for egg producers as the world’s first low-carbon supermarket eggs and a feature by the *Egg Industry* staff on how livestock producers are making carbon trading pay by trading carbon credits on the Chicago Climate Exchange.

For a look at the new digital publication, go to www.EcoAgri.Biz.

Egg Prices Won't Decline Much Anytime Soon

Egg prices that are double what they were last winter are unlikely to decline anytime soon, and the increase isn't all grain prices. “Most people assume that higher grain prices are boosting egg prices, but most of the increase is due to supply and demand,” says Scott

Beyer, Kansas State University poultry scientist. “Right now supplies are down, demand is up.”

The average price of large eggs in the Midwest was \$1.48 per dozen on Jan. 4, 2008, more than double the average price of 69 cents a year earlier.

“It’s doubtful that egg supplies will increase anytime soon,” Beyer says. “In the past, when egg prices increased, the highly competitive industry raced to expand by adding more facilities. However, fears about the strength of the economy and higher interest rates mean that producers are reluctant to borrow funds to add facilities.” He continues that high steel costs have increased building and cage costs, and it can take years to secure the needed building permits to expand a facility.

Other factors that have kept egg prices high are animal welfare guidelines, a weak dollar that has aided exports, last summer’s drought in the Southeast, and high feed costs driven by the rise of the ethanol industry.

Regulatory issues add costs as well. Even if a producer were ready to expand, it might take two years to get a new facility built to pack eggs.

Beyer notes that consumer demand

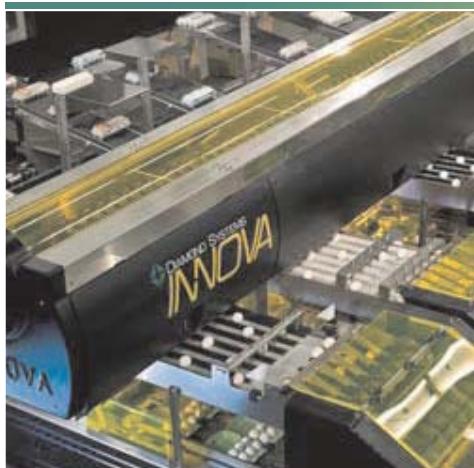
has been strong of late, with consumption showing a steady increase after decades of decline. He notes that the link between egg consumption and heart disease has proven untrue, with many of the same universities that once published research showing that people should eat fewer eggs now touting all the nutritional advantages of eggs.

U.K. Hellmann's Moves to Free-Range

Hellmann’s says that by July all its mayonnaise sold to foodservice and retail in the United Kingdom will be from free-range layers. Unilever Food-solutions, which owns the brand, says that the move will mean 200,000 hens will be raised out of cages.

According to Susan Gregory, category marketing director, Unilever has been working on moving to free range since 2006.

“Hellmann’s is a large user of eggs and we had to ensure that we could keep up with demand while ensuring that the quality and taste remained the same. At the time, there simply weren’t enough free-range eggs available to satisfy demand. However, now that production of free-range eggs has increased we are able to move our supply.” **EI**



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Standing-Room-Only as UEP Debates How to Counter Activists

California effort to ban cages prompts producers to look for best ways to reach consumers.

By Edward Clark, Editor

In what could be one of the biggest and most important battles of U.S. egg industry history, the United Egg Producers (UEP) and state organizations are formulating plans on how to counter efforts by animal rights organizations to ban caged egg production.

Judging from the stand-room-only audience of more than 200 at UEP's animal welfare committee meeting in Atlanta preceding the group's board meeting in January, industry leaders take the issue very seriously.

The meetings were held in conjunction with the International Poultry Expo and International Feed Expo.

Foremost in the discussion was how to combat the effort spearheaded by the Humane Society of the United States (HSUS) to ban caged production in California.

Officials said that while they believed HSUS would be successful in obtaining sufficient signatures to place a measure before California voters come November, the egg industry will be successful in defeating a cage ban referendum.

More Difficult than HSUS Thought

HSUS has found it more difficult than it thought to obtain signatures, "and that's good news for us," said Pacific Poultry and Egg Association's (PPEA)

executive director, Debbie Murdock. "They're having to spend about \$4 per signature."

Signature Verification

Because the signatures must be verified, "we won't know until late June if it's on the ballot." Murdock added that "more people are concerned about their pocketbook," than if layers are raised in cages or run free, and, research by agricultural researcher Adrian Williams at Cranfield University in the United Kingdom shows that layers raised under cage-free conditions leave a larger carbon footprint than caged layers.

"We're optimistic we will defeat the effort," she said. Officials did not discuss the specifics of how they will combat the effort by HSUS and others, however.

"All Hands on Deck"

While the primary focus right now is on California, "we may see activity in other states," said UEP's attorney Kevin Haley. He added that "we have a lot of good to show." Haley continued, however, that some egg producers have hidden behind their bio-security mantra, while PETA (People for the Ethical Treatment of Animals) have put comic books in the schools that denounce animal agriculture. "As we fight these battles, we need all hands on deck and much more money," Haley said.

Gene Gregory, president and CEO of UEP said in an interview following the meeting that right now, the board of his organization has authorized to help states like California in two ways:

- Funding—"which may grow a lit-

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tle”—is available to help states, and

•Consultants they work with on cage bans are available to states.

Part of what the industry is fighting, one board member said, “is horrible

is very serious. We are in a battle to save our industry. We have to be united.”

Gary West, president of JS West, Modesto, Calif., and new board chairman of UEP, said, “I’m positive” we will

At the moment, though, he agrees that “California is the biggest challenge, and we have to believe it’s winnable.” He added that California could be a wedge for other states.

“How that turns out will affect us deeply. We need to be joined at the hip.” Oldenkamp continued that the firm in California that has been hired to win the contest for the industry “has an excellent track record.”

“As we fight these battles, we need all hands on deck and much more money”—Kevin Haley

footage” on PETA’s web site. What is needed, he said, are virtual tours of modern egg production facilities that show the positive conditions under which eggs are produced.

Colorado Legislative Effort

One state looking at cage ban legislation is Colorado, “but I’m very comfortable with Colorado. They’re (the egg industry) going to win this thing there,” Gregory said. He added that it’s far easier to defeat legislation than referenda. Gregory continued, however, that “this

win the battle in his state, but he added that winning will be costly.

Mark Oldenkamp, vice president of northwest operations for Valley Fresh Foods, Woodburn, Ore., and chairman of UEP’s animal welfare committee, said that while the anti-cage focus right now is on California, “my biggest fear is that some in the industry will look at their states” as being exempt from a similar battle. He added that UEP’s staff and experience can be invaluable to states facing referenda or legislative issues as they emerge.

Federal Issues

On the federal front, there have been some successes over the past year, said UEP Washington representative Howard Magwire.

“A big one is that there is no animal welfare title in the farm bill, and a year ago we didn’t know. He added, “We also got some poultry research” money, and 100 percent indemnification of AI. Magwire continued, however, that “the tough thing looming is energy policy.” There is not much chance of ethanol policy reform in an election year, he continued. **EI**

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What Was New at this Year's IPE

By Dr. Simon M. Shane

Editor's Note: In the following article, Egg Industry writer Dr. Simon Shane reviews some of the new products and services offered by vendors at the 2008 International Poultry Expo in Atlanta. Specific items are reviewed which reflect current trends influencing the U.S. and international egg industries and offer the potential to enhance productivity.

Intervet

Intervet (www.intervetusa.com), now integrated with Schering Plough Animal Health, promoted Innovax-ILT. This type-3 Marek's disease (HVT) virus-vectored laryngotracheitis vaccine can be administered by the subcutaneous route in replacement pullets at day old to protect against both MD and LT. Since the vaccine expresses only the immunogenic glycoproteins of LT, there is no risk of developing either a carrier state or producing clinical disease as encountered with chick embryo origin vaccines. Innovax-ILT is administered at the hatchery, facilitating more precise control over reconstitution and administration compared to field application. Data presented by Intervet confirms protection through 7 weeks of age and should serve as a useful primary vaccine, with boosting at 8 to 9 days using conventional CEO vaccine. The effectiveness of the vaccine is however limited by early exposure to field strains of Marek's disease. The vaccine may benefit some producers, although field experience will be necessary to establish cost effectiveness. The first commercial flocks to receive the vaccine are now 60 weeks of age and are clinically unaffected although there is no documentation of challenge which is the hallmark of vaccine protection. Unlike the broiler industry in which LT is a problem in many regions, there is no evident impact on pullet growth, livability or subsequent productivity of flocks using current vaccination programs.

Fort Dodge Animal Health

Fort Dodge Animal Health (www.fortdodge.com) promoted Poulvac *E.coli* atten-

uated vaccine. The product is administered by coarse spray at the hatchery with one or two boosters during the rearing period. The vaccine is derived from an O78 pathogenic serotype *E.coli* strain and provides broad protection against airsacculitis and peritonitis infection. *E.coli* is responsible for elevated mortality in some Midwest operations. Losses of up to 10 percent in flocks have been recorded through the first cycle, then increasing during molting or when flocks are stressed. Introduction of Poulvac *E.coli* vaccine generally reduces mortality to acceptable levels consistent with breed standards when combined with chlorination of drinking water, improvement in ventilation and elimination of routine dust removal using gasoline-powered blowers. The efficacy of vaccines administered by the spray or water route can be influenced by pH, and mineral and organic contaminants.

Animal Science Products

Animal Science Products (www.asp-inc.com) introduced Spray-Vac, a stabilizer which supports the viability and hence efficacy of live bacterial and viral vaccines administered by coarse aerosol. The product will buffer reconstituted vaccine solutions to a pH value approximating neutrality and will protect vaccines from oxidation by chlorine and other ions present in tap water. Structured trials have demonstrated the value of Spray-Vac in protecting live *Mycoplasma* vaccine administered by the spray route.

EcoSmart Technologies

EcoSMART Technologies (www.ecosmart.com) of Canada supply liquid and granular insecticides with aromatic oils as the active agents. These can be used to suppress ectoparasites including lice and mites which are frequently encountered on free-range or non-confined flocks. EcoSMART products can be applied either directly to birds or can be fogged since they are approved by the U.S. National Organic Program.

Biosecurity Eastern Technologies

Eastern Technologies Inc. (www.east-erntechnologies.com), a newcomer to the IPE, demonstrated a range of Orex protective clothing including disposable coveralls, shoe covers and headwear. Increased levels of biosecurity associated with the risk of introducing a range of infections including low-pathogenicity avian influenza have created a demand for quality disposable protective clothing to limit mechanical transmission of viral and bacterial disease-causing agents.

Garner Environmental Services

Garner Environmental Services (www.garner-es.com) is a specialist company equipped to respond to emergencies such as oil and chemical spills and major disruptions in infrastructure. They were the approved contractor responsible for depletion and disposal of turkeys infected with low-pathogenicity avian influenza in Virginia during the spring of 2007. Based on their experience, Garner Environmental Services is capable of responding rapidly with appropriate equipment and trained personnel following the emergence of a catastrophic disease.

X-ACT, Systems of Canada

X-ACT, Systems of Canada (xactsystemscomposting.com) manufactures a mobile composting system which can be used to process mortality, house litter and manure associated with a disease outbreak. Their 40-foot composter can be trucked to a site and assembled rapidly. The system is set up to operate in conjunction with a transportable support module which includes a grinder, mixer and hoppers to maintain batch or continuous operation.

Synbiotics Corp.

Monitoring for the presence of avian influenza (AI) antibodies has become a standard surveillance procedure. **Synbiotics Corp. (www.synbiotics.com)** demonstrated the Flu Detect solid state antigen capture assay, which serves as a primary

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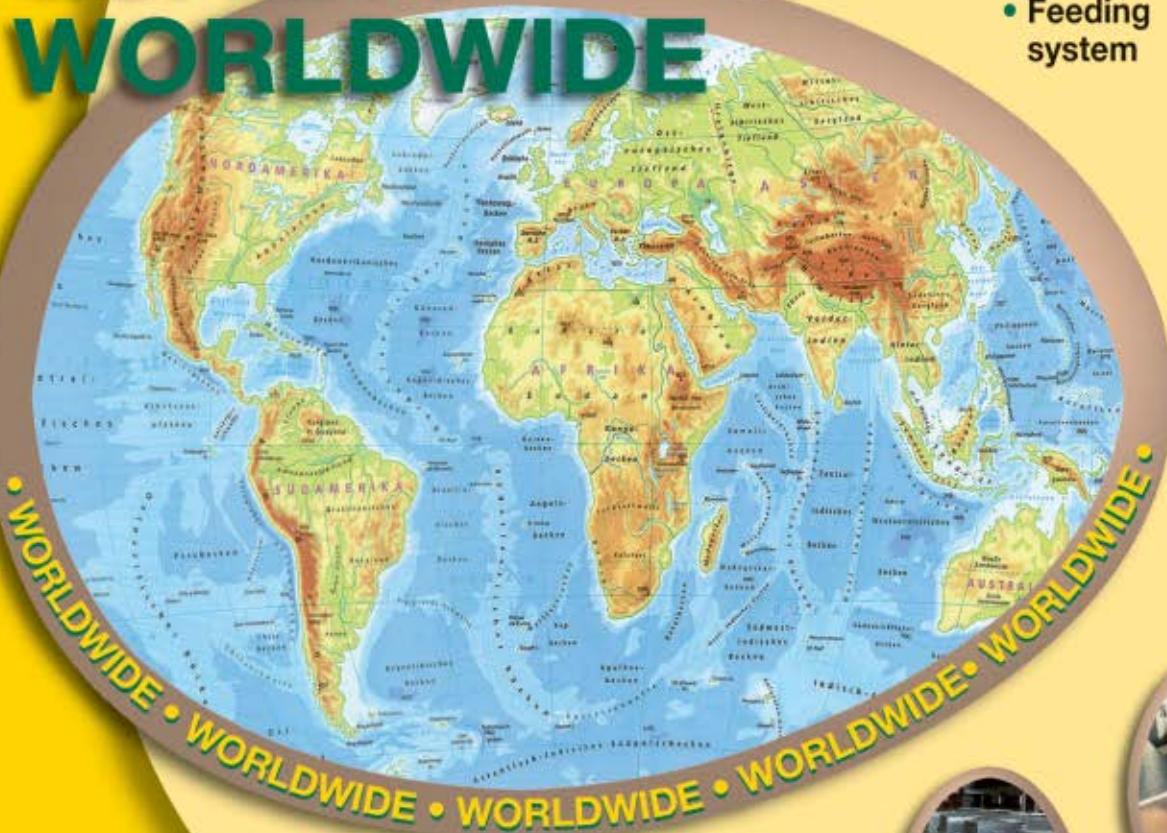
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• Egg collecting system



• Manure drying system



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| What Was New at this Year's IPE |

technique to detect AI Type A antigen collected by tracheal or cloacal swabs. The test is field deployable and can be used to indicate the presence of avian influenza virus in symptomatic poultry flocks associated with either primary outbreaks or as an adjunct to eradication programs. Positive samples are referred to a reference laboratory for confirmation using RC-PCR technology.

Idexx Laboratories

Idexx Laboratories (www.idexx.com) supply the FlockChek Avian Influenza ELISA Test Kit to determine the presence of antibody in samples submitted for routine surveillance or to ascertain immunity after vaccination in areas where this method of protection is allowed.

Inverness Medical

BinaxNOW is a solid state Avian Influenza Type A antigen kit marketed by **Inverness**

Medical (www.invernessmedicalpd.com) which can be used to screen for the presence of influenza Type A antigen to provide a result in 15 minutes.

Innovative Equipment Solutions

Innovative Equipment Solutions of Arkansas (www.innovativeequipment.org) supplies Neptune Disinfecting Systems for trucks, trailers and other vehicles. Wash Stations are available for wheels and underbody or complete full canopy disinfection.

Egg Processing Kuhl Corp.

Kuhl Corp. (www.kuhlcorp.com) demonstrated tray washing systems incorporating stack loaders, washers and in-line spin dryers which can be configured for a variety of retrofit and new installations. Decontaminating plastic trays is considered essential in a comprehensive biosecurity program for off-line production of cage-free eggs. Cleaning egg trays is required to prevent cross transmis-

sion of pathogens and to reduce the possibility of mold contamination on eggs stored for up to 7 days in farm coolers.

Nuovo AG

Nuovo AG of Switzerland (www.nuovo.ch) demonstrated the Egg-Jet Sprinter which can be attached to packers to imprint brand or date on shells. Up to two lines of printing are possible and models can process up to 100 cases per hour. Each cartridge can process 200,000 eggs according to data provided by the manufacturer.

Orka

Orka (www.eggtester.com) of Israel, manufacturer of the Egg Analyzer introduced the Eggshell Force Reader. This model can quantify shell strength at a rate of 10 seconds per egg. Readings are transferred to a PC to be stored in a database or can be directly printed. **EI**

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► INDUSTRY CALENDAR

2008

APRIL

14: European and American Perspectives On Poultry House Environment

Kreider Farms Restaurant, Manheim, Pa. Details from Patricia Burns, Department of Poultry Science, The Pennsylvania State University, 213 Henning Building, University Park, Pa. 16802; Phone (814) 865-5573; Fax (814) 865-5691; E-mail plb8@psu.edu.

17: Delmarva Poultry Industry, Inc. Booster Banquet

Wicomico Youth and Civic Center, Salisbury, Md. Details from Lori Morrow, Phone (302) 856-9037; Website www.dpichicken.com; Email morrow@dpichicken.com.

24: Webinar: EcoAgribusiness: Economics of Energy Efficiency

Via the internet, from WATT's EcoAgri.Biz, presented by EcoAgri.Biz and American Energy. For more information or to register www.EcoAgri.Biz.

MAY

8-9: National Breeders Roundtable

Airport Marriott Hotel, St. Louis, Mo. Details from U.S. Poultry & Egg Association, 1530 Cooledge Road, Tucker, Ga. 30084-7303; Phone (770) 493-9401; Fax (770) 493-9257; Website www.poultryegg.org.

12: Poultry Management And Health Seminar

Kreider Farms Restaurant, Manheim, Pa. Details from Patricia Burns, Department of Poultry Science, The Pennsylvania State University, 213 Henning Building, University Park, Pa. 16802; Phone (814) 865-5573; Fax (814) 865-5691; E-mail plb8@psu.edu.

JUNE

29 - July 4: XXIII World's Poultry Congress.

Convention and Exhibition Centre, Brisbane, Australia. Event includes 6th Asian-Pacific Poultry Health Conference, 4th International Ratite Science Symposium & 2008 Australian Poultry Information Exchange. Contact: WPC 2008 Congress. Phone +61

7 3858 5594; Fax +61 7 3858 5510. Email: wpc2008@im.com.au. Website www.wpc2008.com.

JULY

6-10: 8th International Marek's Disease Symposium

Southbank Convention Centre, Townsville, Queensland, Australia. In conjunction with the 10th Avian Immunology Research Group Meeting and the XXII World's Poultry Congress and the 6th Asia-Pacific Poultry Health Conference. Details from Dr. Graham Burgess, School of Veterinary and Biomedical Sciences, James Cook University, Townsville, Queensland, Australia; Phone +61 7 4781 5472; Fax +61 7 4781 6833; E-mail graham.burgess@jcu.edu.au; Website www.jcu.edu.au/events/mds.

SEPTEMBER

10: Delmarva Poultry Conference

Sponsored by the University of Delaware and the University of Maryland. Clarion Hotel, Ocean City, Md. Details from Jennifer Timmons; Phone (410) 742-8788; Email mdchick@umd.edu.

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