



# **Low Level Presence and its Implications for the Seed Industry**

**For CropLife Canada's  
Biotech Science & Regulatory Committee**

**Canadian Seed Trade Association**

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# Low Level Presence and its Implications for the Seed Industry

1. **Overview of the global seed market**
2. **International Trade of Seed**
3. **Importance of a policy on LLP**
  - **Specific Concerns for Canada**
4. **Overview of the Process**

# Overview of the Global Seed Market

## Size of the World Seed Market (\$US B)

	1985	1991	1996	2001	2007
Total	20.0	26.0	30.0	30.0	35.0
Traded	1.3	3.0	3.3	3.9	5.5

- **Area planted with biotech traits increasing**
  - **247 million acres in 2007 (222 million in 2006)**
- **Counter Season production increased almost 20 times in 20 years**
- **Asynchronous regulatory authorization systems result in trade disruptions**

## Seed Exports 2007 (\$US million)

	Agric.	Veg.	Total		Agric.	Veg.	Total
<b>USA</b>	<b>581</b>	<b>288</b>	<b>869</b>	<b>Australia</b>	<b>62</b>	<b>12</b>	<b>74</b>
<b>Netherlands</b>	<b>182</b>	<b>641</b>	<b>823</b>	<b>Israel</b>	<b>8</b>	<b>62</b>	<b>70</b>
<b>France</b>	<b>590</b>	<b>200</b>	<b>790</b>	<b>Austria</b>	<b>66</b>	<b>2</b>	<b>68</b>
<b>Germany</b>	<b>360</b>	<b>33</b>	<b>393</b>	<b>Argentina</b>	<b>50</b>	<b>12</b>	<b>62</b>
<b>Denmark</b>	<b>216</b>	<b>40</b>	<b>256</b>	<b>Brazil</b>	<b>46</b>	<b>8</b>	<b>54</b>
<b>Canada</b>	<b>180</b>	<b>71</b>		<b>Poland</b>	<b>48</b>	<b>3</b>	<b>51</b>
<b>Chile</b>	<b>114</b>	<b>60</b>	<b>174</b>	<b>S. Africa</b>	<b>37</b>	<b>7</b>	<b>44</b>
<b>Mexico</b>	<b>153</b>	<b>7</b>	<b>160</b>	<b>N. Zealand</b>	<b>26</b>	<b>17</b>	<b>43</b>
<b>Italy</b>	<b>89</b>	<b>58</b>	<b>147</b>	<b>Sweden</b>	<b>40</b>	<b>3</b>	<b>43</b>
<b>Hungary</b>	<b>137</b>	<b>8</b>	<b>145</b>	<b>Turkey</b>	<b>30</b>	<b>8</b>	<b>38</b>
<b>Belgium</b>	<b>120</b>	<b>4</b>	<b>124</b>	<b>Czech. R</b>	<b>29</b>	<b>5</b>	<b>34</b>
<b>Japan</b>	<b>29</b>	<b>70</b>	<b>99</b>	<b>Thailand</b>	<b>3</b>	<b>26</b>	<b>29</b>
<b>U.K.</b>	<b>55</b>	<b>25</b>	<b>80</b>	<b>Romania</b>	<b>26</b>	<b>0</b>	<b>26</b>
<b>China</b>	<b>37</b>	<b>38</b>	<b>75</b>	<b>Switzerland</b>	<b>22</b>	<b>2</b>	<b>24</b>
<b>Spain</b>	<b>45</b>	<b>29</b>	<b>74</b>	<b>Total</b>	<b>3551</b>	<b>1826</b>	<b>5377</b>



## Importance of A Policy on LLP for Seed

- **Biotech crops are becoming more important – 247 million acres in 2007**
- **About 15% of all the world's commercial seed is moved globally**
  - **Particularly north/south for counter season production**
- **Asynchronous approval and assessment systems can disrupt trade**
- **It is simply not possible for an exporting country with an approved trait to totally exclude adventitious, low level presence of the trait from seed and grain shipments**

# Importance of A Policy on LLP for Seed

## Specific Concerns for Canada


- **Growing exports of forage seed to EU (Italy is the second largest destination)**
  - **Low Level Presence of GM canola in forage seed**
  - **Development of GM alfalfa**


## Overview of the Process

- **Codex working group on LLP risk assessment for food and feed**
- **No comparable body for environmental assessment**
- **Seed industry supports that it be taken up by the OECD Working Group on Harmonization of Regulatory Oversight in Biotechnology**

## Overview of the Process

- Objective is a set of principles for guidance on **risk assessment** to assist importing countries to make a decision when faced with LLP of a biotech trait not yet approved for release in the importing country, but approved in the exporting country
- CSTA works through the International Seed Federation
- OECD Working Group met April 14 and 15 – ISF represented. Purpose to determine the feasibility of the Working Group undertaking a project on LLP

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- **Much of the discussion on 4 approaches (proposals) identified by Steering Group**
    - 1. Introduce LLP into draft environmental considerations document**
    - 2. Use concept of “familiarity” (assessment and safety information already available)**
    - 3. Use concept of “information and traits” (specific information on traits already available)**
    - 4. Create a “points to consider” document (brings all of the above together)**

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- **ISF's positions on 4 approaches**
    - **Environmental consideration document**  
– is an important piece, but LLP work should be done in parallel
    - **Familiarity and Information and Traits** – important and work should begin immediately – focused on seed



## Working Group Meeting Outcomes

- **Did not agree on the feasibility of a project**
- **Did refine the three approaches (proposals) for a potential LLP project**
  1. **Incorporate LLP into the Environmental Considerations document**
  2. **An LLP document developed in parallel with the Environmental Considerations Document**
  3. **A “points to consider” document on the principles of risk assessment incorporating LLP**

## Working Group Meeting Outcomes

- **OECD Working Group will consider the three new proposals in its deliberations around whether and how to move forward with a project on LLP**
- **OECD document for the annual meeting of the Working Group in June**
- **Seed industry is “cautiously optimistic”**