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GMO: What is the Market Saying

Dermod Mark

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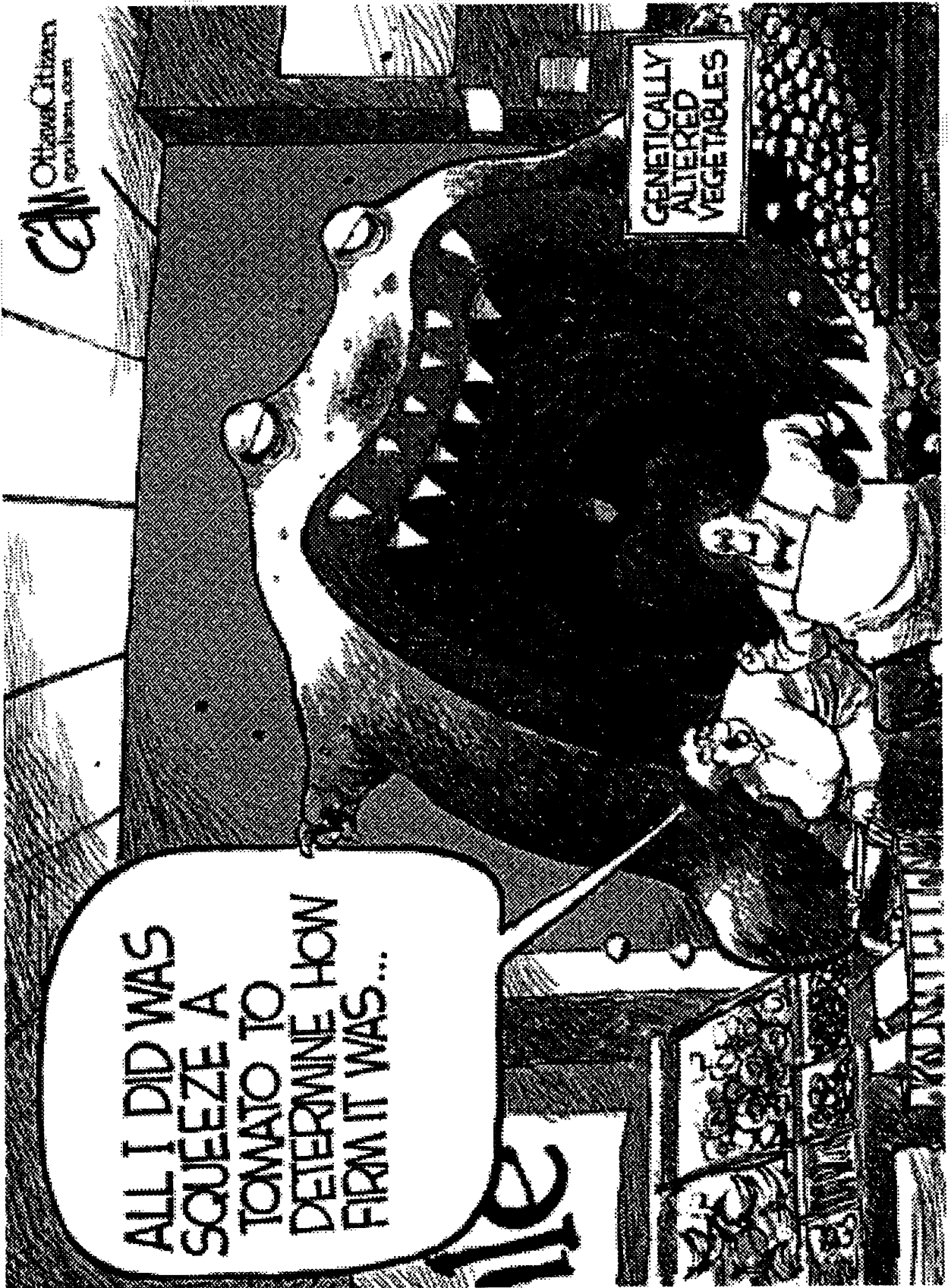
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GMIO

What is the Market Saying

By: Dermot Mark,
Export Marketing Manager



➤ Nature of the Debate

➤ 3 Countries ↔ U.K., Japan, Switzerland

➤ North America

➤ Conclusions

☞ Nature of Debate

☞ Bilingual

☞ Science and Technology

Vs.

Moral and ethics

How did we get here?

What is Food?

Food:

A nutritious substance that can be taken into an animal, or plant to maintain life and growth.

∞ Food is Family

∞ Food is love

∞ Food is culture

∞ Food is passion

∞ Food is emotional

A tale of 3 countries

Mandatory labeling April 1, 2000 with one year moratorium

What needs to be labeled?



Designated Item - Not substantially
equivalent

High oleic soybean, its oil and products

Labeling Method-

Soybeans (high oleic, GMO)

Designated Items- Substantially Equivalent

☞ tofu and tofu products and by-products

☞ soybeans - fresh, canned, boiled, roasted

☞ edamame (soybeans in the pod)

☞ soybean sprouts

☞ natto (fermented soybeans)

☞ soy milk

☞ miso

☞ soy flour

☞ corn snacks

☞ corn starch

🌀 corn - fresh, frozen or canned

🌀 popcorn

🌀 potatoes

🌀 food with any of the above as ingredients

Labeling - Mandatory

Soybeans (GMO soybeans - segregated)

Soybeans (GMO soybeans - non segregated)

Labeling - Discretionary

Soybeans (non GMO soybeans)

Soybeans (segregated non GMO soybeans)

Labeling Not Required

GMO - Protein DNA non existent/eliminated

☞ soy sauce

☞ soybean oil

☞ corn oil

☞ canola oil

☞ potato starch

☞ corn flakes

Trade/Retail Reaction

Japan Tofu Association

- source non GMO

Jusco

- GMO Free

Kirin

- GMO Free

United Kingdom

Requirement

- mandatory labelling & information,
retail and foodservice

Trade/Retail Reaction

Iceland

- GMO free (?)

Sainsbury/M+S/Tesco - Private Label - GMO free

Responsibility of supplier to prove GMO free.

Switzerland

Mandatory labelling

- 1% tolerance

Retail Reaction

- no GMO products at retail
- GMO free meat and eggs

North America

☞ What's a GMO?

☞ No we don't,.... well maybe we do, ...
oh my gosh, we do,what do I do now?

☞ The debate is only beginning

Lessons Learned

- ✧ If one retailer becomes GMO free, the rest will follow
- ✧ Retailers perceive a market advantage/necessity to provide GMO free
- ✧ Retailers are demanding certification/documentation of GMO free status
- ✧ Retailers are going well beyond regulatory requirements.

Conclusions

- ✧ Traceability will remain
- ✧ GM technology is here to stay
- ✧ The consumer will decide