



# ProTerra Webinar

## Update on the EU Commission's study on new genomic techniques





# Agenda

- Emese van Maanen, Managing Director, ProTerra Foundation,  
**Welcome and Introduction ENGA**
- Florian Faber, ARGE Gentechnik-frei, Managing Director,  
**The Non-GMO Market in Europe**
- Heike Moldenhauer, The European Non-GMO Industry Association (ENGA), Secretary General,  
**The EU Commission's Plan to Deregulate New GMOs – Update**
- Q & A





# Who we are

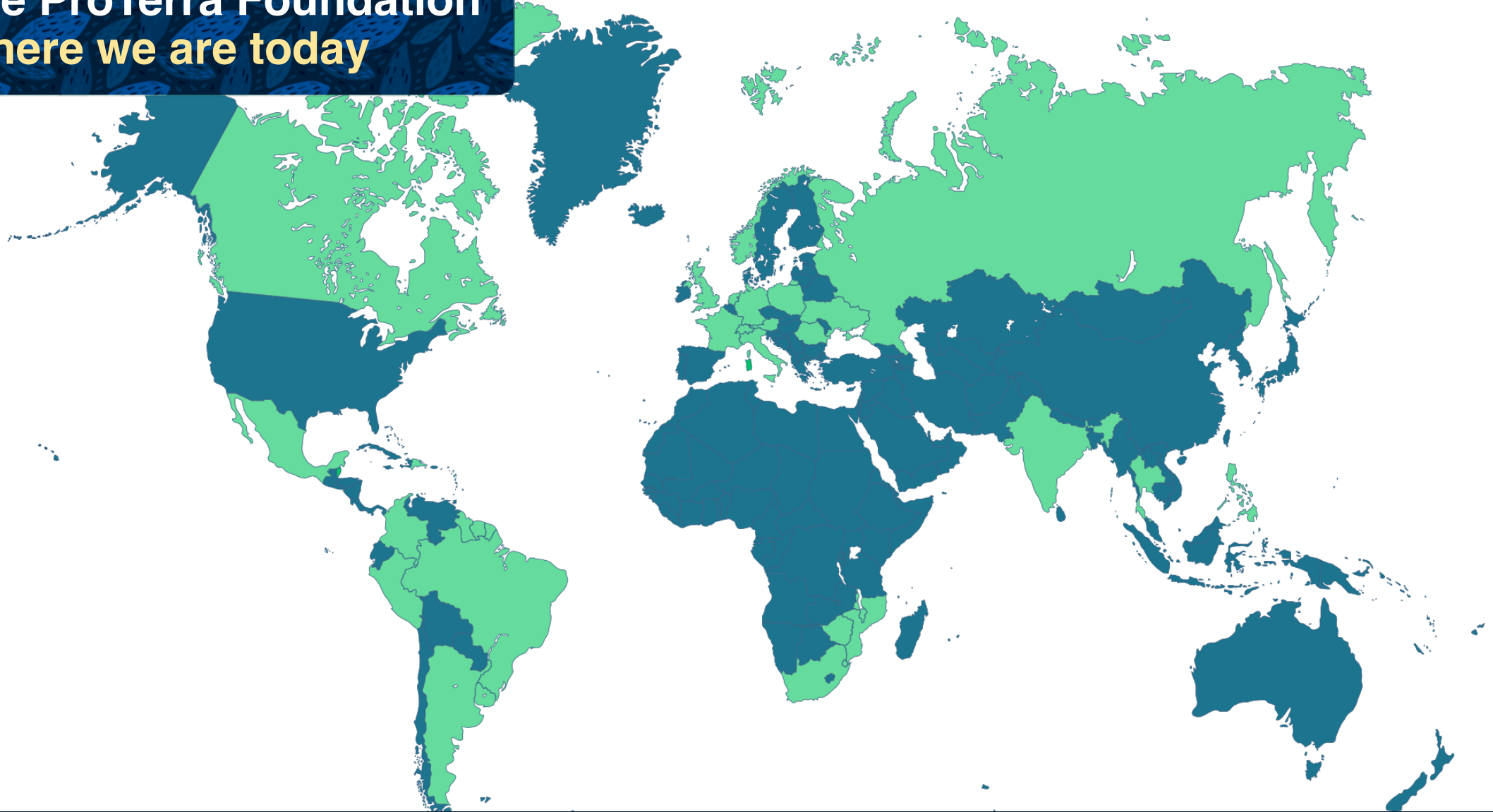
The ProTerra Foundation is a non-for-profit organization, located in the Netherlands

We envisage a world where all businesses:

- contribute to the protection of biodiversity by e.g. switching to non-GMO production
- conserve natural resources and
- ensure that workers and local communities are treated with dignity and respect

# The ProTerra Foundation

## Where we are today

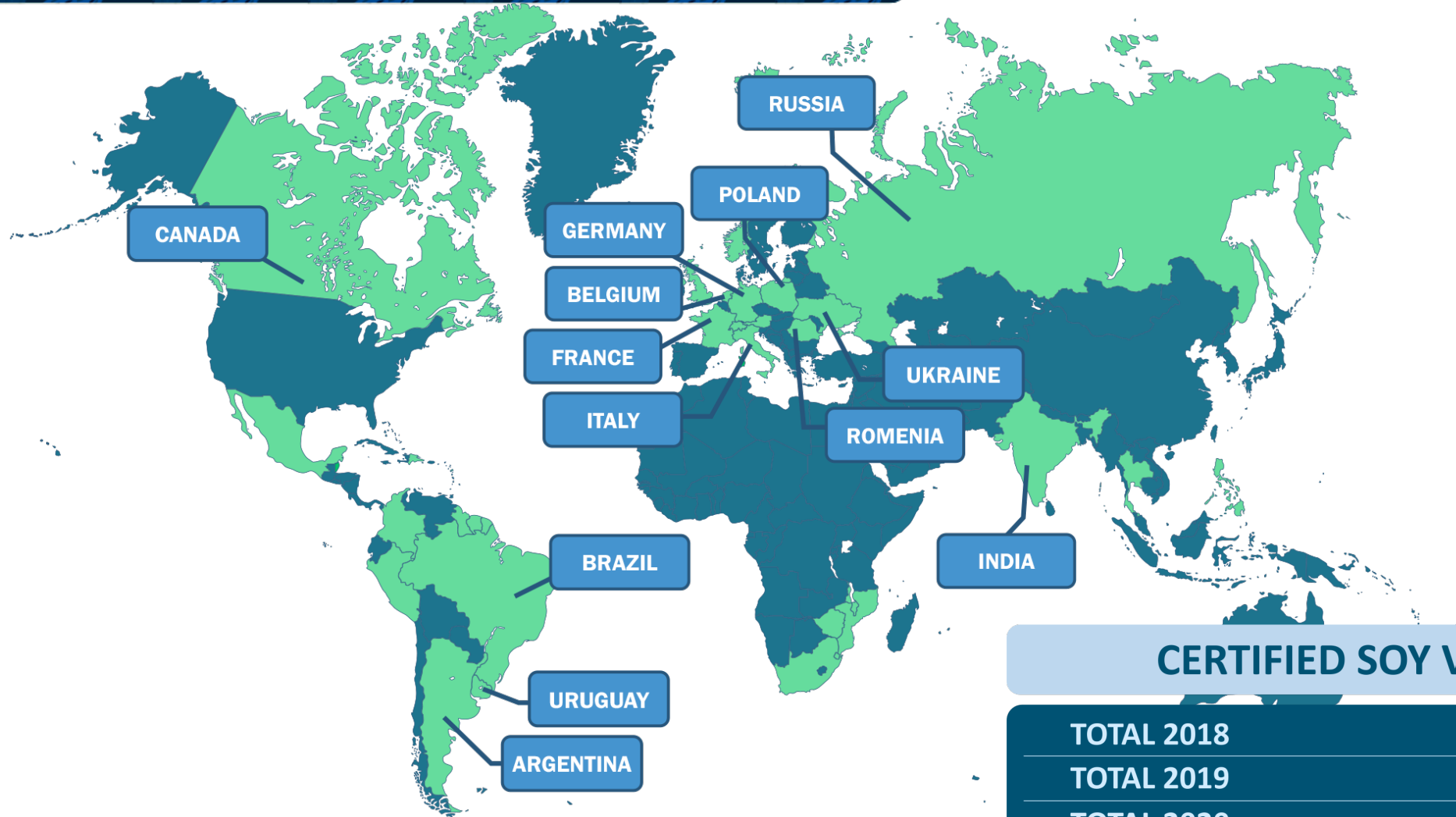


Argentina, Austria, Belgium, Belize, Brazil, Canada, Colombia, Eswatini, Germany, Dominican Republic, France, Guadelupe, Guyana, India, Italy, México, Malawi, Mozambique, Netherlands, Norway, Peru, Philippines, Poland, Romania, Russia, South Africa, Switzerland, Thailand, Ukraine, United Kingdom, Uruguay and Zimbabwe.



# The ProTerra Foundation in numbers

## SOY 2020

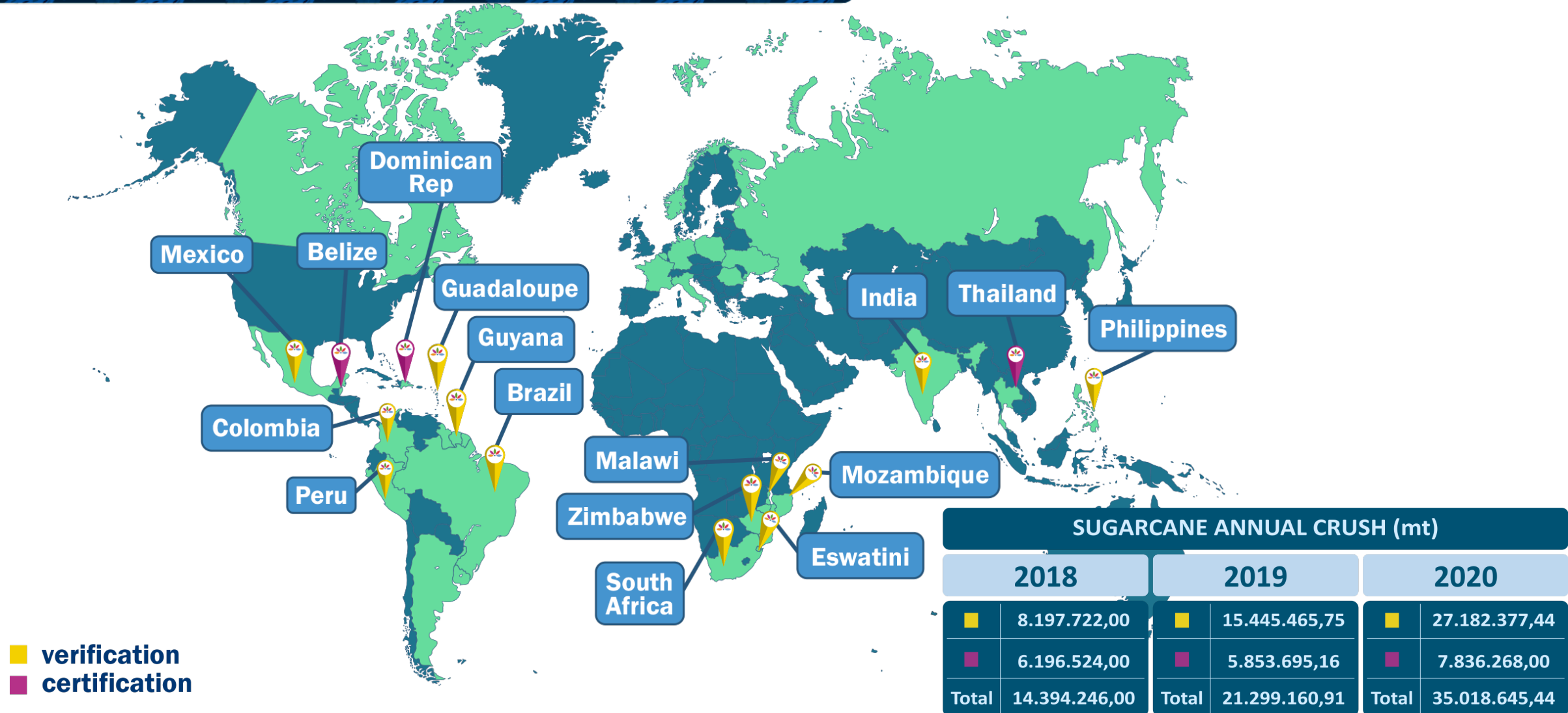


### CERTIFIED SOY VOLUME

|            |              |
|------------|--------------|
| TOTAL 2018 | 3.511.000,00 |
| TOTAL 2019 | 2.988.373,87 |
| TOTAL 2020 | 3.032.171,39 |

# The ProTerra Foundation in numbers

## SUGARCANE 2020







# ENGA – The European Non-GMO Industry Association in Brussels

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## ENGA:

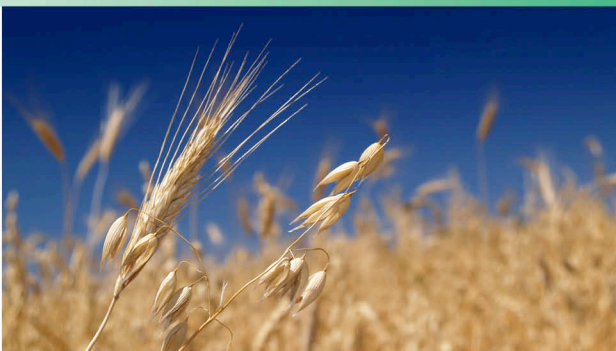
### A Strong and Pro-Active Voice for the Non-GMO Industry in Brussels



- **Highlights and represents** the business interests of the constantly growing European Non-GMO sector (production, processing, marketing, retail, certification, labelling)
- **Supports** its members in meeting consumer demand for Non-GMO agriculture and Non-GMO food products (networking, establishing a pan-European information and market support network)
- **Advocates for strict regulation of old and new GMOs** in order to keep untested and invisible GMOs from entering the EU food and feed chains



# THE NON-GMO MARKET IN EUROPE



**Webinar:**  
**EU Commission's Study on  
New Genomic Techniques**



# Content



- Brief introduction:  
ARGE Gentechnik-frei
- Origins of the non-GMO-market  
in Europe
- Current market developments
- Key challenges
- Q & A





- First non-GMO labeling system
- International pioneer (since 1997)
- More than 6.500 products
- Dairy products, eggs, poultry: in Austria 100% non-GMO
- Leading brands & producers
- 90% of retail – drivers of non-GMO
- High awareness and credibility of non-GMO label





# ARGE Gentechnik-frei



- **Founded 1997** – in the wake of the Austrian referendum against GMOs (1,23 mill. signatures)
- **Pioneer** in non-GMO production and labelling
  - first non-GMO standard 1998
  - first products with non-GMO label 1998
- **Multi-stakeholder** platform
  - Retailers
  - Food & feed producers
  - Farmers' organizations (organic & conv.)
  - Science
  - NGOs & associations
- Politically & economically **independent**  
(financed solely by members' & labelling fees)
- **238 members** (producers & retailers of all sizes)
- Reasons for success:
  - Wide socio-political consensus against GMOs
  - Integrated system: 1 standard – 1 label
  - ARGE Gentechnik-frei as pro-active player

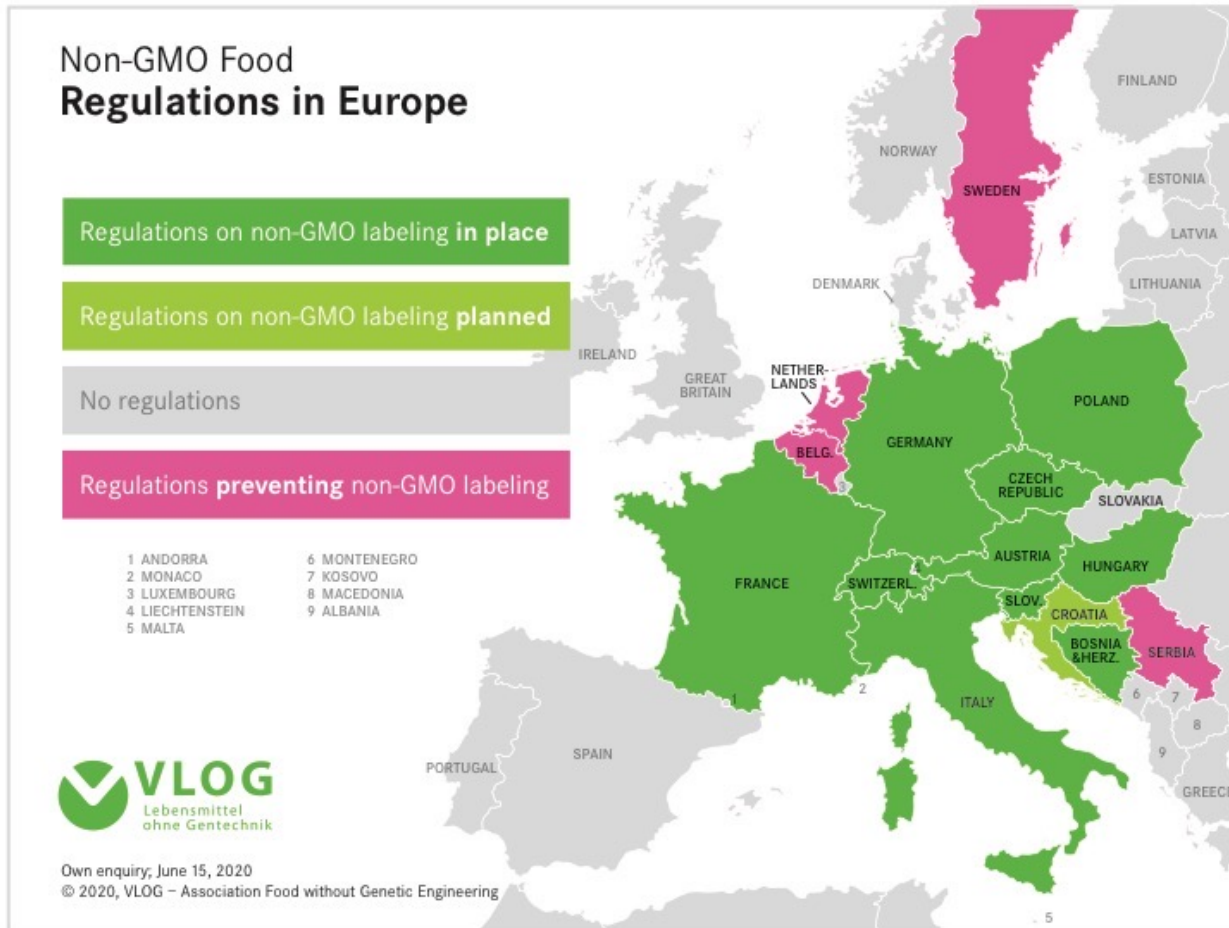


# Origins of the non-GMO Market



- 1996: first **commercial cultivation** of GMO-soy in the US
- 1996: first vessel with **GMO-soy** arrives in Europe  
→ large scale socio-political controversies
- 1997: **referendum** in Austria against GMO
- 1997: first vessel with **certified non-GMO-soy** in Europe
- 1998: first **non-GMO standard**: "Guideline for the labeling of non-GMO food" (Austrian Codex Alimentarius)
- 1998: first products with **non-GMO label** (Austria)
- 1999 EU-Regulation 2092/91: **organic products** = non-GMO
- 2004 EU-Regulation 1829/2003: **labeling for GMO products**  
→ important impulse for non-GMO with animal products!
- 2008 EGGenTDurchfG in **Germany**
- 2008 Labeling systems in: **Slo, Lux, F**
- 2010 Austrian dairy & egg production 100% non-GMO
- 2012 Start of **Danube Soy** project → European protein strategy
- 2014/15 strong dynamics with non-GMO production & labeling  
on a **growing amount of European markets**
- 2016 first attempts for **harmonization** of non-GMO systems

# Significant Growth of non-GMO



**Hungary:**  
since Jan. 2017

**Poland**  
since Jan. 2020

**Switzerland**  
since July 2020

**France**  
new standard  
for dairy feed  
2020

**Czechia**  
since 2017

Status map: June 2020



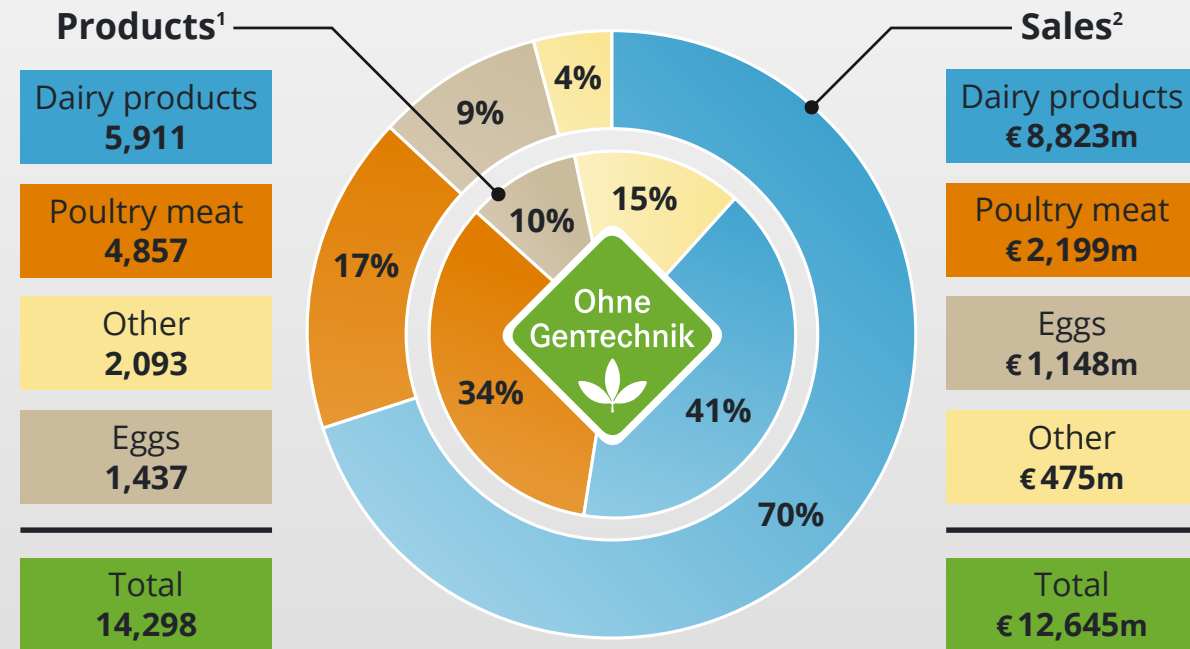
# Booming Market in Germany

## Germany:

Rapidly growing market shares:

- 2020: plus 19 % compared to 2019
- 12,645 Mill. Euro „Ohne Gentechnik“

## “Ohne GenTechnik” [Non-GMO] Food in Numbers Number of products and sales



¹ Own enquiry

² End consumer expenditure on food licensed for the "Ohne GenTechnik" [Non-GMO] seal – own enquiry at the manufacturing industry plus flat retail margin and sales tax

Source: VLOG – Association Food without Genetic Engineering, as of 31 December 2020

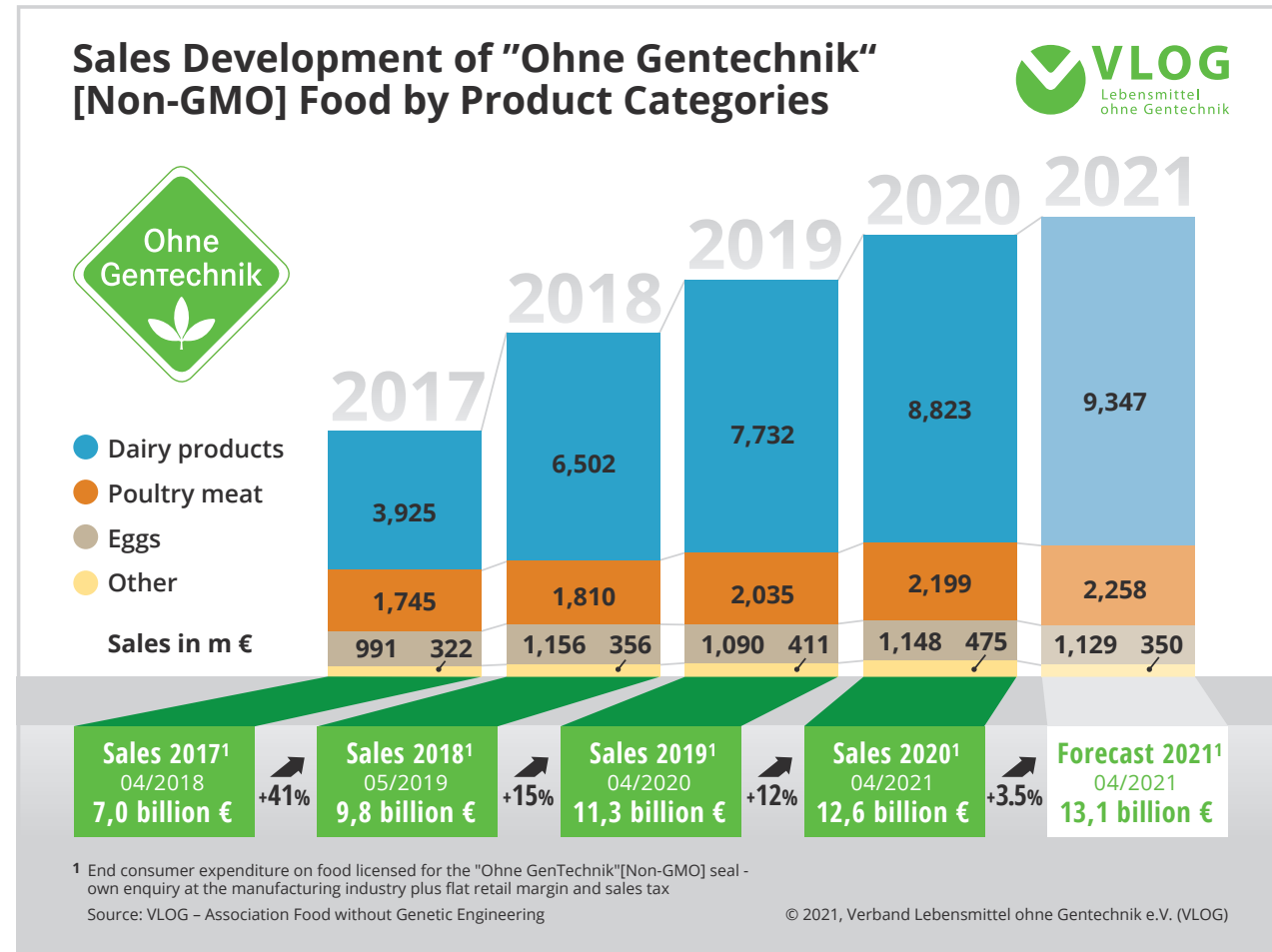
© 2021, Verband Lebensmittel ohne Gentechnik e.V. (VLOG)

# Booming Market in Germany

## Germany:

14.298 products on the market (status: 12/2020)

- Working towards full switch to non-GMO in several production segments (e.g. dairy – 72%; eggs: 98%)
- Strong “pull factor” for other European markets importing to Germany (e.g. Italy, Poland)





# Strong non-GMO Market in A



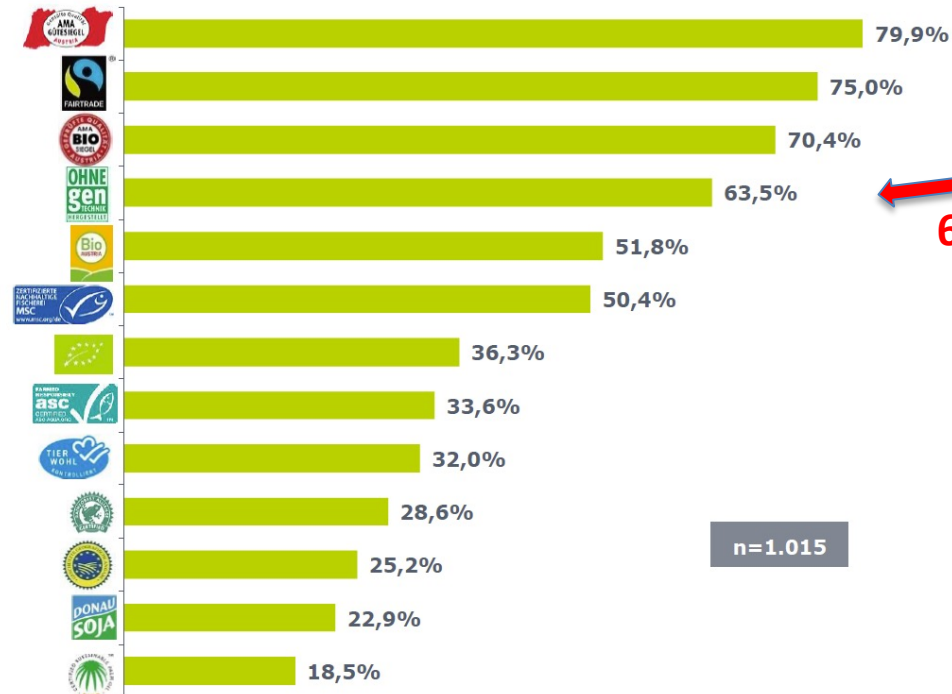
- App. **6.500 products**
  - Complete **dairy** production (since 2010), complete **egg** production (since 2010), complete **poultry** production (since 2012)
  - Non-GMO = obligatory standard for **public purchasing** with: dairy, eggs & egg products, poultry; pork: until 2025)
  - **Key market challenge:**  
conversion of pork production (currently app. 10-12% non-GMO)
- non-GMO as **USP** and **widely accepted quality standard** for Austrian food production
- important **export criteria** for Austrian products

# High Credibility with Consumers

## 9. Wie vertrauenswürdig wirken diese Gütezeichen aus dem Lebensmittelbereich auf Sie?

Top-2-Box: bewertet mit "1 = sehr vertrauenswürdig" und "2" (5-stufige Skalierung)

(Basis: Respondenten sind zwischen 14 und 75 Jahre alt)



63,5%

- high **credibility**
- top 3-5 in all market research
- high **public awareness** (75,4%)



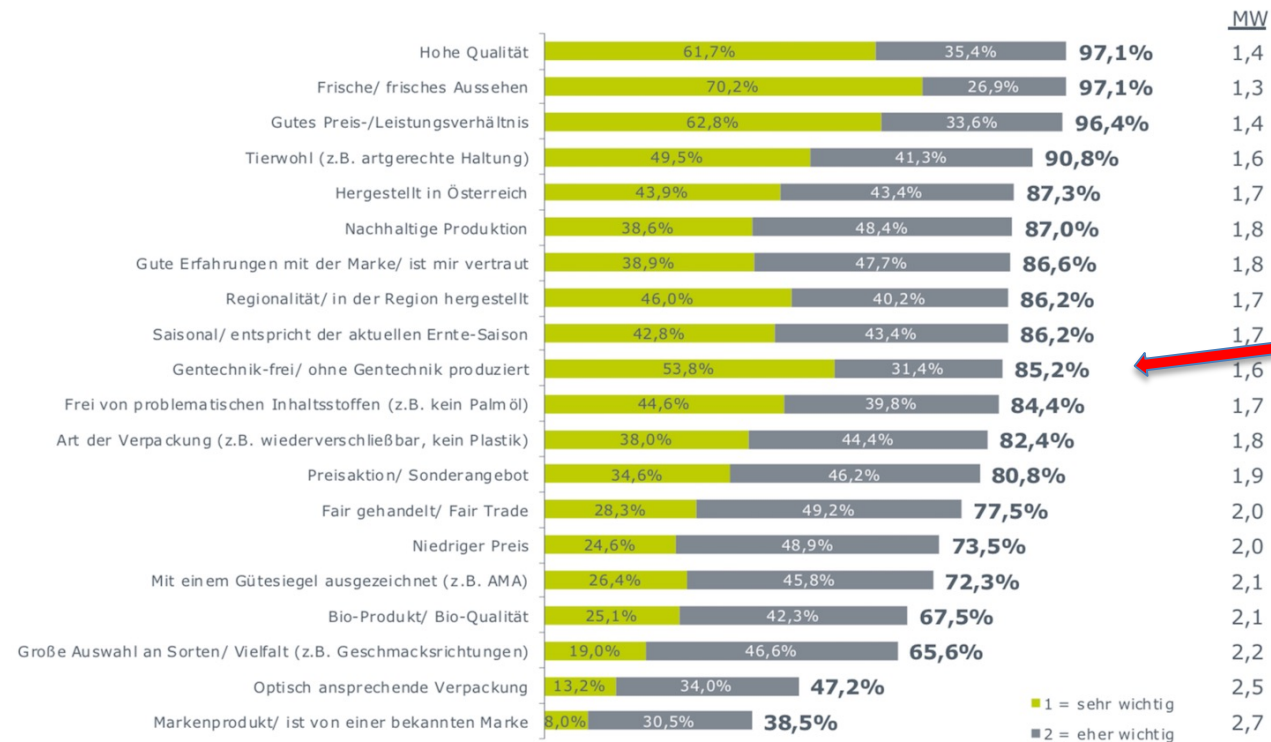


# Important Buying Motive



## Wichtige Aspekte beim Einkauf von Lebensmitteln

Top-2-Box: sehr wichtig / eher wichtig | 4-stufige Skalierung



Non-GMO  
production:  
**85,2%**

# Key Challenges



- Need for **harmonization of non-GMO standards** (all standards currently on national level only)
- **Soaring costs for non-GMO soy** (June 2021: € 850 / ton for non-GMO soy meal = nearly double price then for conventional soy)
- Safeguard long-term **availability of non-GMO soy** in appropriate quality
- Availability of **additives in non-GMO quality** (e.g. vitamins, enzymes, lecithin, yeast, ...)
- Non-GMO is **not on top of the public agenda** anymore (public debate has moved to: animal welfare, plastics, climate protection, CO<sub>2</sub> footprint, regional production, ...)
- And, of course: intention of EO Commission to deregulate EU GMO-laws for **new genomic techniques**



# Your Questions?





# CONTACT

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# The EU Commission's Plan to Deregulate New GMOs – Update

Heike Moldenhauer  
ENGA Secretary General

ProTerra Webinar 4 November 2021





# The EU Commission's Plan to Deregulate New GMOs – Update



- **New GMOs: Current Status**
- **EC's Plan to Deregulate New GMOs**
- **Political Process/Timetable**
- **Impacts of a Deregulation**
- **Impacts for the Non-GMO Sectors**
- **What to do?**



# New GMOs: Current Status



- **European Court of Justice** ruling in 2018: **New GMOs** (produced with techniques like CRISPR/Cas) **have to be regulated in the same manner as old GMOs**

This means:

- New GMOs are **subject to the precautionary principle**: obligatory environmental and food safety **risk assessments**
- New GMOs are **subject to transparency requirements**: obligatory **traceability** throughout the entire value chain, **labelling** for genetically engineered feed and food



# EU Commission's Plan to Deregulate New GMOs



- EC: current EU GMO legislation is „**not fit for purpose**“
- **Focus: plants**
- „**Policy action**“ is needed for plants produced with **targeted mutagenesis and cisgenesis** (= GMOs without integration of DNA from other species)
- 1. Similar risk profile as plants obtained with conventional breeding techniques (EFSA)
- 2. Potential contributions to Green Deal
- **Adaption of authorisation process, risk assessment, labelling, traceability**
- = Deregulation (lowering of standards)



# EU Commission's Plan to Deregulate New GMOs - Criticism



1. Similar risk profile as plants obtained with conventional breeding techniques (EFSA)

Criticism:

- Relevant studies not considered
- **No experience with new GMOs**
- Similarity to breeding does not imply safety
- **Whole genome is accessible to changes**

2. Contribution to Green Deal objectives

Criticism: **hypothetical plants**

Concern: **lowering safety and transparency standards for unproven sustainability claims**



# EU Commission's Plan to Deregulate New GMOs – Political Process/Timetable



- **Inception Impact Assessment** (closed 22 October 2021)
- **Impact Assessment** (2nd quarter 2022)
- **Legislative proposal** (2nd quarter 2023)
- **Negotiations with Member States and European Parliament** (co-decision procedure)
- **Duration:** one year minimum



# Impacts of a Deregulation of New GMOs



- For plants derived from **targeted mutagenesis and cisgenesis** (= GMOs without integration of DNA from other species): **no risk assessment, no traceability and labelling**
- **Approximately 95 % of all new GM plants** currently in the pipeline **will be excluded from GMO legislation**
- **Loss of control over *all* value chains** due to lack of GMO labelling: new GMOs can be present everywhere, not only in Non-GMO and organic value chains
- **Untested and invisible GMOs** on EU fields, markets, supermarket shelves, plates



# Impacts of Deregulation of New GMOs for the Conventional and Organic Non-GMO Sectors



- **Massive setbacks in the conventional Non-GMO sector**, as a Non-GMO label reliably has to exclude old *and* new GMOs
- **Severe setbacks for the organic Non-GMO sector**: the obligatory exclusion of GMOs as a major selling point would be eliminated
- **Loss of consumer trust**: How to explain if a Non-GMO product is contaminated with a new GMO? How to explain that organic could be “with GMOs”?
- **Loss of investments**: especially for the Non-GMO sector (changing formulations, developing quality assurance systems, marketing)



# EU Commission's Deregulation Plan: What to do?



## Key demands:

- **All new GMOs** have to be subject of **comprehensive risk assessment**
- **Freedom to conduct business** has to be ensured for conventional and organic Non-GMO sectors
- **Development and implementation of a thorough traceability and labelling system** for new GMOs have to be top priority of the impact assessment

# Retailers' Resolution: European Retailers Take a Strong Stand Against Deregulating New GMOs





# Contact



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# Thank you for your participation!

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