

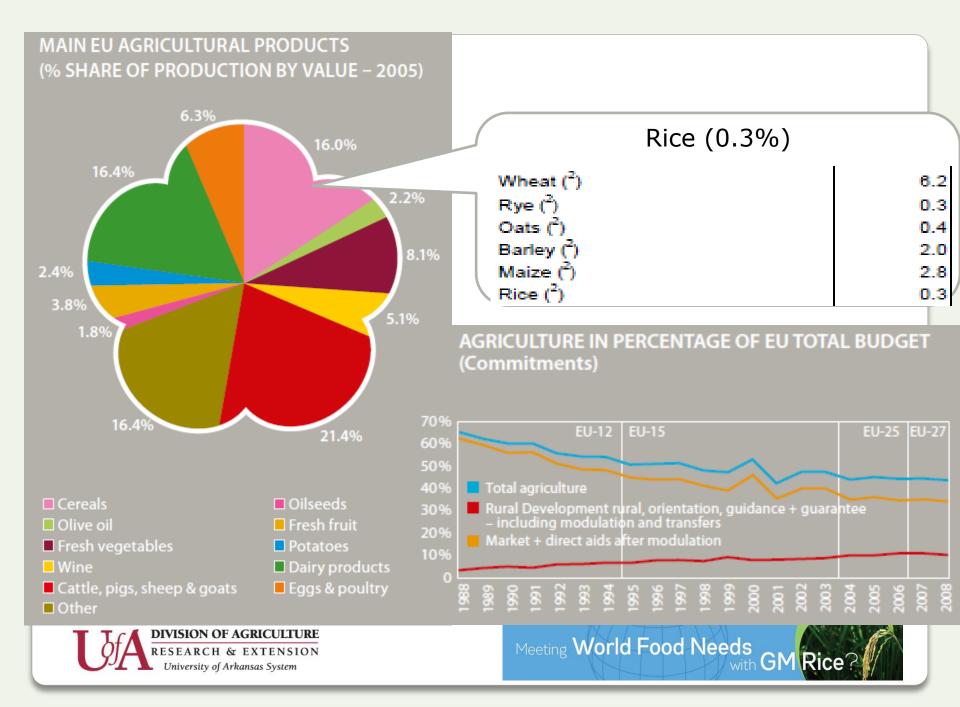
(GM) rice sector in the EU

GM Rice Research Group Hans De Steur Ghent University 2012.10.08



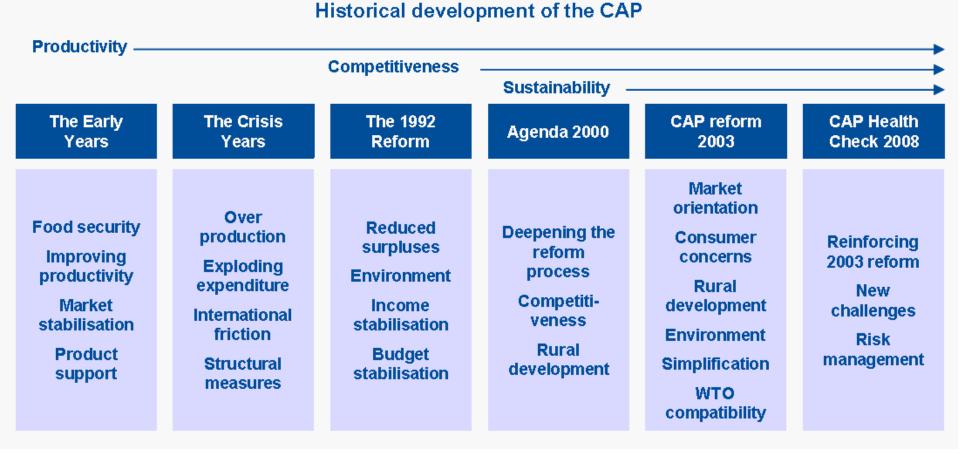
RESEARCH & EXTENSION

University of Arkansas System



Common Agricultural Policy = CAP (°1962) and CAP reform (2003)

- = System of European Union agricultural subsidies and programs
 - e.g. Trade controls, Price-support measures, Income transfers, Production subsidies, Health regulations
- 42 % of the EU's budget and still decreasing
- Pressures to reform



Common Agricultural Policy = CAP (°1962) and CAP reform (2003)

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- $\Rightarrow~$ 42 % of the EU's budget and still decreasing
- Pressures to reform
- \Rightarrow The 2003 reform in the rice sector involved:
- <u>decoupling subsidies from production</u> => <u>direct support/payment</u> to producers
- a 50% reduction in intervention prices
- Everything But Arms agreement = duty-free and quota-free access for rice imports from LDCs (least dev.)
- Evaluation of CAP reform:
- effective EU rice sector policy measures
 - \Rightarrow Maintenance of EU rice production levels + expansion of exports
- High world market prices, a growing consumer awareness of quality-differentiated rice and EU support policies are <u>sustaining EU rice production at record levels</u> (USDA rice outlook)
- With EU rice prices now largely following world market prices, the <u>price premiums</u> enjoyed on EU rice markets prior to reform have <u>largely disappeared</u>.
- $\Rightarrow~$ CAP is due to be reformed by 2013





Table A.9. Rice projections

Crop year

	PRODUCTION (Kt)		Growt	h (%) ⁵	IMPOR	rs (Kt)	Growth (%) ⁵		EXPORTS (Kt)		Grow	h (%) ⁵
	Avg 2009- 11est	2021	2002-2011	2012-2021	Avg 2009- 11est	2021	2002-2011	2012-2021	Avg 2009- 11est	2021	2002-2011	2012-2021
WORLD	467 554	542 072	2.49	1.17	32 871	42 775	1.75	1.92	32 802	42 679	2.10	1.93
DEVELOPED	18 101	18 941	0.54	0.61	4 912	5 808	1.63	1.57	4 151	4 694	-0.62	1.61
NORTH AMERICA	6 819	7 285	-0.21	1.29	968	1 291	3.83	2.39	3 261	3 736	-1.70	2.29
Canada	0	0			375	421	4.27	1.01	0	0		
United States	6 819	7 285	-0.21	1.29	592	870	3.61	3.13	3 261	3 736	-1.70	2.29
EUROPE	2 632	2 918	4.00	1.04	1 772	2 066	0.55	1.21	424	396	7.61	-1.47
EU(27)	1 810	1 742	1.74	-0.03	1 222	1 444	2.28	1.50	234	220	0.99	-0.14
Russian Federation	705	1 050	11.06	3.13	244	249	-5.62	-1.28	180	169	27.60	-2.92
Ukraine	101	111	8.58	0.74	100	115	-0.68	1.90	7	6	55.83	-1.86
OCEANIA DEVELOPED	438	744	-2.95	1.03	195	156	5.28	0.94	236	375	-0.54	0.37
Australia	438	744	-2.95	1.03	151	112	5.98	1.33	236	375	-0.54	0.37
New Zealand	0	0			44	44	2.65	0.00	0	0		
OTHER DEVELOPED ¹	8 212	7 994	0.09	-0.17	1 978	2 295	1.32	1.50	229	187	-0.94	-0.82
Japan	7 680									181	-1.18	0.00
South Africa		PROD	UCTIC	N						0	0.00	-0.25
DEVELOPING	449 4				(87 985	2.54	1.97
AFRICA	16 4	1. Ital	y + 2.	Spair	n (80 %	o);				188	-13.98	-6.51
NORTH AFRICA	38		-	-	-	-				40	-26.21	-16.48
Algeria		3. Gre	ece +	4. PO	rtugal (、12%)				0 40	0.00	-0.41
Egypt	37	5 Era	nco' 6	Dom	ania: 7		uaria, (Q Hum	aarv	149	-26.21 13.53	-16.48
SUB-SAHARAN AFRICA LATIN AMERICA and CARIBBEAN	12 0	Э. гіа	nce, o	. KUIII	ania; 7	. Duig	jana, o	5. Hull	iyaiy	2 537	10.74	-0.64
Argentina		⇒ ~	55%	Indica						648	11.09	0.28
Brazil	79		5570	Inuicu						597	41.85	-3.72
Chile	/ 5									1	38.84	-1.16
Mexico	- 1									28	31.00	-0.90
Uruguay	g	TRADI								983	4.13	-0.12
ASIA and PACIFIC	414 6	40.0								85 259	2.26	2.28
Bangladesh	33 4	- 40 %	OTE	J rice	consur	nption	i < imp	oortea		13	12.87	-0.68
China ²		Dico	nradu	icina N	1C mai			hin El		216	-10.48	-1.88
India	95 8	- Rice	prout	icing r	1S mai	illy tra	ide wit		J	5 155	-3.52	-2.66
Indonesia	41 213									2	42.52	0.24
Iran, Islamic Republic of	1 458									0	0.00	-0.46
Korea	4 476	4 285	-1.06	0.00	341	433	9.37	0.79	3	3	-66.83	0.00
Pakistan	6 296	9 179	3.93	0.88	30	11	32.10	0.01	3 208	4 399	4.26	-0.01
Philippines	10 747	15 368	2.65	2.60	1 576	1 252	2.77	-1.70	0	0	0.00	0.12
Thailand	21 620	23 145	2.17	1.04	367	367	61.56	-1.63	9 177	8 717	1.39	1.63
Turkey	502	583	10.21	1.23	303	425	1.33	3.68	15	11	35.84	-2.18
Viet Nam	26 961	32 732	2.11	1.46	567	447	48.44	-2.67	6 993	9 404	6.98	2.67
LDC Asia ³	29 828	40 499	4.27	2.57	1 027	313	4.30	2.00	1 774	7 221	21.51	11.71
LEAST DEVELOPED COUNTRIES (LDC)	72 619	95 504	4.27	2.37	6 552	10 181	0.76	4.20	1 940	7 381	21.51	11.25
									3 950	4 555		
OECD ⁴	21 960	22 321	0.03	0.39	4 919	6 185	2.22	2.01			-2.02	1.85
NON-OECD	445 594	519 752	2.62	1.20	27 952	36 590	1.66	1.91	28 852	38 125	2.77	1.94

EU-27 - Import from EXTRA EU-27

Statistical Regime : 4

Quantity : 1000 Tons

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	11/02	11/10
Cereals total (incl. feed cereals)	16 507	12 733	12 454	10 114	10 003	20 486	20 583	9 353	8 584	14 037	-15	63.5
- wheat & wheat flours	12 145	6 825	7 008	7 111	5 721	6 406	6 856	6 442	4 335	6 006	-50.5	38.6
- other cereals & malt	4 362	5 908	5 446	3 003	4 282	14 080	13 727	2 911	4 249	8 030	84.1	89
Rice	1 366	1 387	1 304	1 193	1 320	1 455	1 640	1 477	1 309	1 593	16.5	21.7
- rice - Indica	978	1 017	965	913	903	1 099	1 258	1 065	995	1 237	26.5	24.3
- rice - Japonica	208	186	199	147	202	144	136	90	70	128	-38.7	81.7
											•	

EU-27 - Export to EXTRA EU-27

Evolution Statistical Regime : 4 of trade (%) Quantity: 1000 Tons 2005 2002 2003 2004 2006 2007 2008 2009 2010 2011 11/02 11/10 Cereals total (incl. feed cereals) 23 291 24 960 16 965 22 308 22 454 18 718 27 946 26 808 32 135 27 883 19.7 -13.2 16 192 10 236 22 206 23744 37.4 -20.4 - wheat & wheat flours 13 754 14 383 11 131 12 900 19 833 18 894 9 537 6 262 8 482 4 602 -5.8 7.1 other cereals & malt 10 577 5 833 9 4 0 9 8 113 8 391 8 988 256 -5.2 -17.8 Rice 270 239 195 205 146 141 159 158 311 119 84 74 28 56 -68.5 -25.8 - rice - Indica 131 54 41 35 41 -15 - rice - Japonica 117 107 127 242 206 50.3 137 87 96 129 118





Evolution of trade (%)

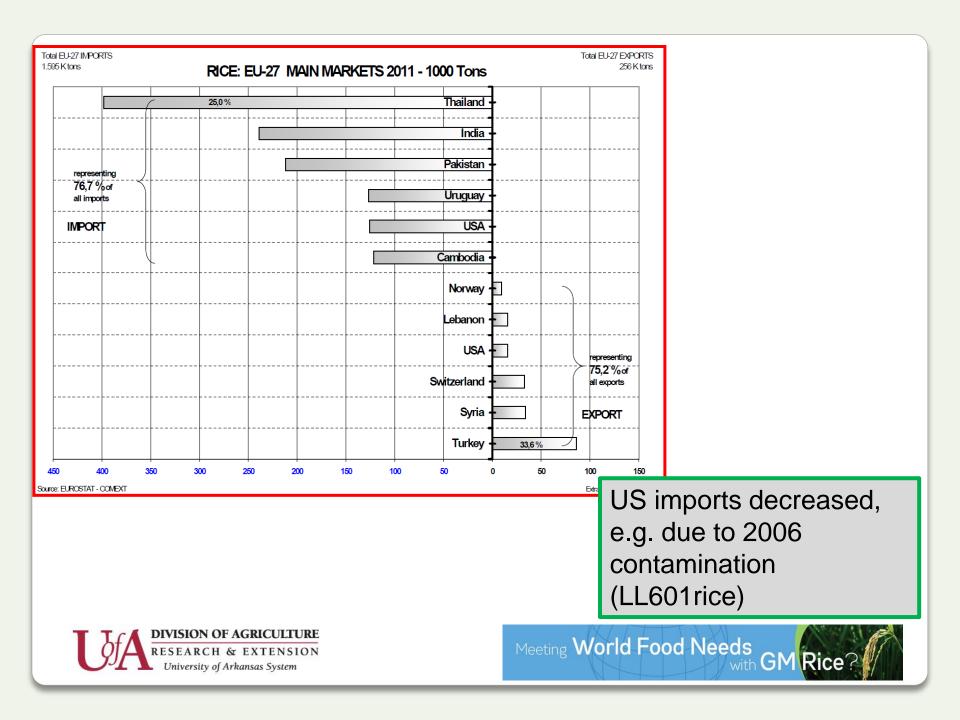


Table A.9. Rice projections (cont.)

Crop year

	CONSUMPTION (Kt)		Grow	th (%) ³	PER CAPIT	'A (Kg)	Grow	th (%) ³	
	Avg 2009-11est	2021	2002-2011	2012-2021	Avg 2009-11est	2021	2002-2011	2012-2021	
WORLD	460 150	542 359	1.69	1.24	56.7	59.9	0.15	0.34	
DEVELOPED	18 822	19 983	0.69	0.53	13.0	13.3	0.09	0.19	
NORTH AMERICA	4 440	4 907	1.61	1.01	12.9	13.0	0.68	0.19	
Canada	375	421	4.27	1.01	11.0	11.2	3.22	0.15	
United States	4 065	4 485	1.39	1.01	13.1	13.2	0.48	0.19	
EUROPE	3 917	4 583	1.34	1.38	5.3	6.1	1.15	1.28	
EU(27)	2 740	2 965	1.35	0.69	5.5	5.8	0.95	0.44	
Russian Federation	766	1 128	0.82	3.26	5.4	8.0	1.02	3.42	
Ukraine	194	220	2.68	1.45	4.2	5.0	3.33	1.95	
OCEANIA DEVELOPED	369	518	-1.77	2.12	13.8	17.0	-3.33	0.96	
Australia	324	474	-2.28	2.34	14.6	18.6	-3.91	1.14	Dice concumption
New Zealand	44	44	2.65	0.00	10.1	9.1	1.46	-0.97	Rice consumption
OTHER DEVELOPED ¹	10 096	9 975	0.15	-0.13	35.0	32.9	-0.68	-0.53	in the EU
Japan	8 394	7 837	-0.31	-0.68	59.4	55.4	-0.78	-0.62	
South Africa	862	1 046	2.27	1.91	16.4	19.0	1.62	1.52	Tabal size as a
DEVELOPING	441 328	522 377	1.73	1.27	67.6	70.5	0.01	0.22	- Total rice cons
AFRICA	25 512	38 662	3.87	3.72	22.8	27.6	1.45	1.70	grew by 7% in
NORTH AFRICA	4 210	5 189	1.90	1.82	22.1	23.6	1.52	0.66	
Algeria	79	111	2.20	3.20	2.2	2.7	0.70	2.01	2010/11
Egypt	3 861	4 664	1.68	1.64	40.7	41.3	1.10	0.22	-
SUB-SAHARAN AFRICA	21 303	33 472	4.30	4.05	23.0	28.4	1.43	1.84	- 5,2 kg (2007)
LATIN AMERICA and CARIBBEAN	19 041	23 621	0.58	1.87	30.4	33.8	-0.59	0.87	to 5,5 kg per
Argentina	370	530	1.10	3.25	9.2	12.0	0.22	2.46	
Brazil	7 795	8 387	-1.10	0.32	40.0	39.6	-2.12	-0.40	capita (2010)
Chile	201 31	303	0.93	3.25	11.5	15.9	0.04	2.49	
Mexico		1 365	-0.29	3.62	8.2	10.7	-1.54	2.63	(OFCD FAO database)
Uruguay	92	85	10.84	-2.24	8.0	7.9	-1.09	-0.78	(OECD-FAO database)
ASIA and PACIFIC	396 775	460 094	1.66	1.05	84.1	88.2	0.12	0.26	
Bangladesh	33 863	41 249	3.57	1.53	171.7	179.3	1.15	0.20	
China ²	128 754	131 420	0.38	-0.20	77.8	75.5	-0.25	-0.34	
India	92 243	113 176	1.64	1.38	71.4	77.1	-0.28	0.28	
Indonesia	41 595	54 455	2.24	2.26	156.5	184.7	0.81	1.41	
Iran, Islamic Republic of	2 634	4 019	-0.36	3.68	31.3	44.7	-1.18	3.16	
Korea	4 702	4 722	-0.41	0.07	69.5	62.6	-1.21	-1.24	
Pakistan	3 215	4 751	3.96	2.38	14.7	18.2	2.47	1.27	
Philippines	12 382	16 520	2.86	2.52	119.9	131.9	1.65	0.93	
Thailand	12 210	14 583	2.80	1.53	128.8	139.8	1.07	0.70	
Turkey	799	996	5.67	2.32	10.3	11.5	4.32	1.31	
Viet Nam	20 851	23 703	1.36	1.06	189.2	186.7	0.31	-0.12	
LDC Asia ⁴	29 489	33 411	4.13	1.24	128.6	131.8	0.45	0.25	
LEAST DEVELOPED COUNTRIES (LDC)	77 171	97 862	4.03	2.09	68.8	72.0	0.51	0.32	
OECD ⁵	22 809	23 882	0.41	0.43	16.2	15.8	-0.43	-0.21	
NON-OECD	437 341	518 478	1.76	1.28	65.9	69.2	0.10	0.29	

Note: Crop year: Beginning crop marketing year - see Glossary of Terms for definitions.

1. Includes Israel and also transition economies: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan, Armenia, Azerbaijan and Georgia.

2. Refers to mainland only. The economies of Chinese Taipei, Hong Kong (China) and Macau (China) are included in the Other Asia Pacific aggregate.

3. Least-squares growth rate (see glossary).

4. LDC Asia includes Afghanistan, Bhutan, Myanmar, Cambodia, Lao Peoples' Democratic Republic, Nepal, Yemen, Timor Meste, Maldives.

5. Excludes Iceland but includes all EU27 member countries.

Source: OECD and FAO Secretariats.

s th GM Rice?

StatLink ms http://dx.doi.org/10.1787/888932642744

GM Authorisation process

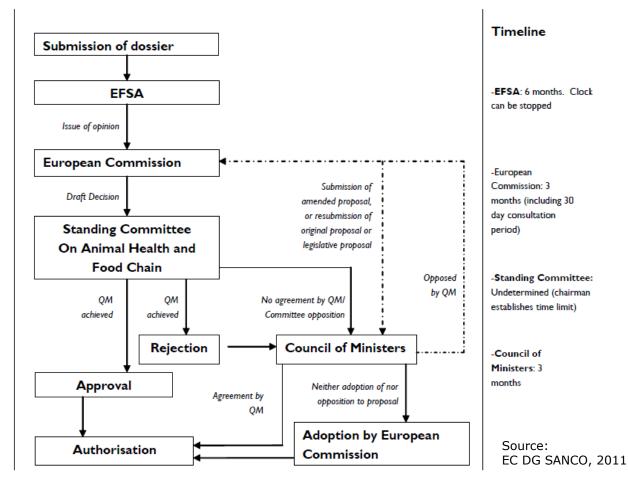
Comments

-Dossier submitted to national authorities and passed to EFSA

-EFSA forwards dossier to European Commission and Member States who may provide comments, sends detection methods and samples for validation by JRC-IHCP -EFSA has 6 months for draft opinion, but can stop the clock for more information

-European Commission makes opinion public for comments (30 day period) -EFSA also send opinion to Member States via EFSA ExtraNet

-European Commission must Inform Parliament and pass proposal to the Council of Ministers



Meeting World Food Needs with GM Rice



Table 5.5: EU asynchronous and asymmetric approvals as sources of LLP

Сгор	Asynchronous approvals	Asymmetric approvals	Total sources of LLP
Maize	6	5	11
Rice	1	4	5
Soybean	2	1	3
OSR/canola	0	1	1
Cotton	3	9	12

Source: After Stein and Rodríguez-Cerezo (2009).

GM Authorisation process



Table 5.4: Progress of applications through EU approval process (June, 2010)

GM crop submission		Stage of authorisation process								
	Applicat Renewal TOTAL				sessment of auth TOTAL		Valid authorisation / Notified as existing product / TOTAL			
Single events:										
Cotton	4	3	7	1	-	1	1	3	4	
Maize	6	1	7	3	-	3	9	4	11*	
Oilseed rape	2	-	2	-	-	-	2	-	2	
Potato	1	-	1	-	-	-	1	-	1	
Rice	-	-	-	1	-	1	-	-	-	
Soybean	8	1	9	-	-	-	2	1	3	
Sugar beet	2	-	2				1	-	1	
Sub-total	21	5	26	5	-	5	16	8	22	
Stacked events:										
Cotton	6	2	8	-	-	-	-	2	2	
Maize	12	1	13	10	-	10	6	1	6**	
Oilseed rape	1	-	1	-	-	-	1	-	1	
Soybean	2	-	2	-	-	-	-	-	-	
Sub-total	21	3	24	10	-	10	7	3	9	
TOTAL	42	8	50	15	-	15	23	11	31	

Note:

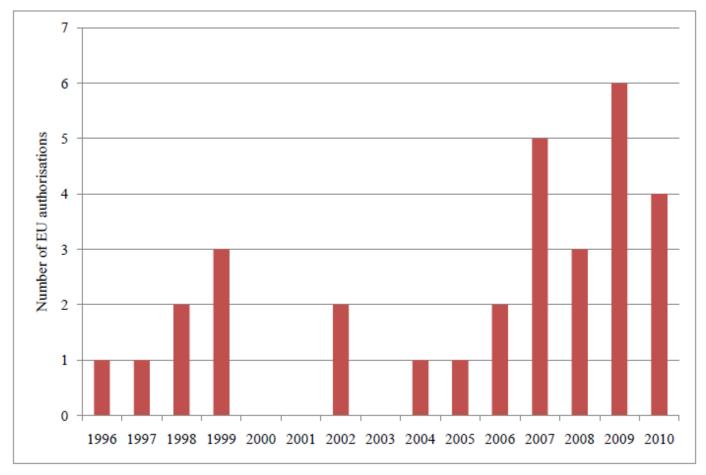


Figure 3.4: GM event authorisations in the EU by year

Source: OECD Bio Track Product Database and EU register of GM food and feed27.

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Agricultural Biotechnology in Europe Planting figures (in ha)

Country vs. Year	2006	2008	2010
Spain 🔳	53.667	79.269	76.575
Portugal	1.250	4.851	4.868
Czech Republic	1.290	8.380	4.830
Poland	100	3.000	3.000
Slovakia 🦁	300	1.900	1.248
Romania	90.000	9.000	822
Sweden	0	0	80
Germany	950	3.173	15
France	5000	0	0
Total	152.557	109.573	91.438

	HT	Bt	HT/Bt	F	Total
Canola/oilseed rape	3				3
Cotton	2	2	2		6
Maize	3	5	9		17
Potato				1	1
Soybean	3				3
Sugar beet	1				1
Total	12	7	11		31

Key:

HT: Herbicide tolerant.



Bt: Insect resistant.

F: Functionality. In this case the potato contains an inhibited gbss gene responsible for amylase biosynthesis. As a result, the starch produced has little or no amylase and consists of amylopectin.

Source: EU register of GM food and feed.

Event name or gene(s)	Product name	Deve ope	require	Trait category	Trait(s)	Developmen stage (blank = ot i.e. not commercialised	her, info on	Time- line	EU approval for import (status summer 2009; red = asynchronicity)	Third country approval (status summer 2009; red = asynchronicity)
LLRICE62	LibertyLink	Bayer	Germany	Insect resist., herbicide tol	Glufosinate to	l. 2 - commercial pip	eline	2010	under assessment	approved
Bt63	MH63		China	Insect resist.	Insect resist.	3 - regulatory pipeli	ne Pre-produc	2009	not submitted (yet)	under assessment
Xa21			China	Other	Leaf blight res	ist. 3 - regulatory pipeli	ne Pre-produc	2010	not submitted (yet)	under assessment
KMD1			China	Insect resist.	Insect resist.	3 - regulatory pipeli	ne Pre-produc	2010	not submitted (yet)	under assessment
B827			Iran	Insect resist.	Insect resist.	3 - regulatory pipeli	ne Released 2	2010	not submitted (yet)	under assessment
GR1	Golden Rice	1 IBBI	Philippines	Crop composition	Betacarotene	coi 4 - advanced devel	opment	2011	not submitted (yet)	not submitted (yet)
Bar68-1			China	Insect resist., herbicide tol	Glufosinate to				not submitted (yet)	not submitted (yet)
		Bayer	Germany	Insect resist., herbicide tol	Herbicide tol.	4 - advanced devel	oprr Planned 20	2012	not submitted (yet)	not submitted (yet)
GR2	Golden Rice	2 IRRI	Philippines	Crop composition	Betacarotene	coi 4 - advanced devel		2012	not submitted (yet)	not submitted (yet)
Bt			Indonesia	Insect resist.	Insect resist.	4 - advanced devel	oprr Field trials	2012	not submitted (yet)	not submitted (yet)
CP IORF-IV			India	Virus resist.	Virus resist.	4 - advanced deve	opment	2012	not submitted (yet)	not submitted (yet)
RTBV-ODs2			India	Virus resist.	Tungro resist.	4 - advanced devel	opment	2012	not submitted (yet)	not submitted (yet)
		Bayer	Germany	Insect resist.	Insect resist.	4 - advanced devel	oprr Planned 20	2013	not submitted (yet)	not submitted (yet)
chi11 tlp			India	Other	Disease resist	. 4 - advanced devel	opment	2013	not submitted (yet)	not submitted (yet)
Bt			Pakistan	Insect resist.	Insect resist.	4 - advanced devel	oprr Field trials	2013	not submitted (yet)	not submitted (yet)
cry1Ac			India	Insect resist.	Insect resist.	4 - advanced deve	oprr Biosafety r		not submitted (yet)	not submitted (yet)
Giyoxalase I & II			India	Abiotic stress tol.	Salinity tol.	4 - advanced deve		2015	not submitted (yet)	not submitted (yet)
Osmotin			India	Abiotic stress tol.	Drought tol.	4 - advanced deve		2015	not submitted (yet)	not submitted (yet)
cry1Ab, cry1C & ba	r		India	Insect resist.	Insect resist.	4 - advanced devel	oprr Planned 20	2015	not submitted (yet)	not submitted (yet)
		I	1			I	I		1	
Products	waiting	Comn	nission A	ction (SCFCAH	vote)	Application	E	FSA	Months from	Months from
						received by	opir	nion	submission	EFSA
						EFSA			until EFSA	opinion until
									opinion	01/08/2011

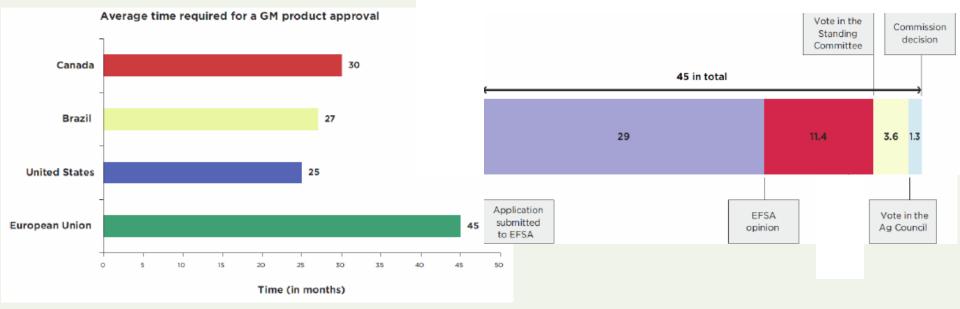
Bayer LLrice62 (ffip)	20/08/2004	30/10/2007	38	45

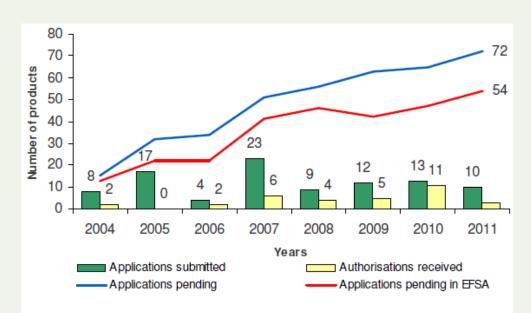
Only LLRice62 (herbicide tolerant)

 \Rightarrow Positive EFSA, but no changes (Brazil LLrice62 not approved)

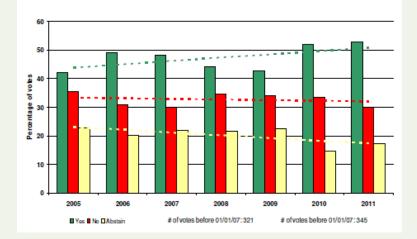
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Member States voting behaviour since 2005



Thank you for your attention !