



Biotech Soy in the Americas and the EU - Today and the Future

International Soybean Growers Alliance



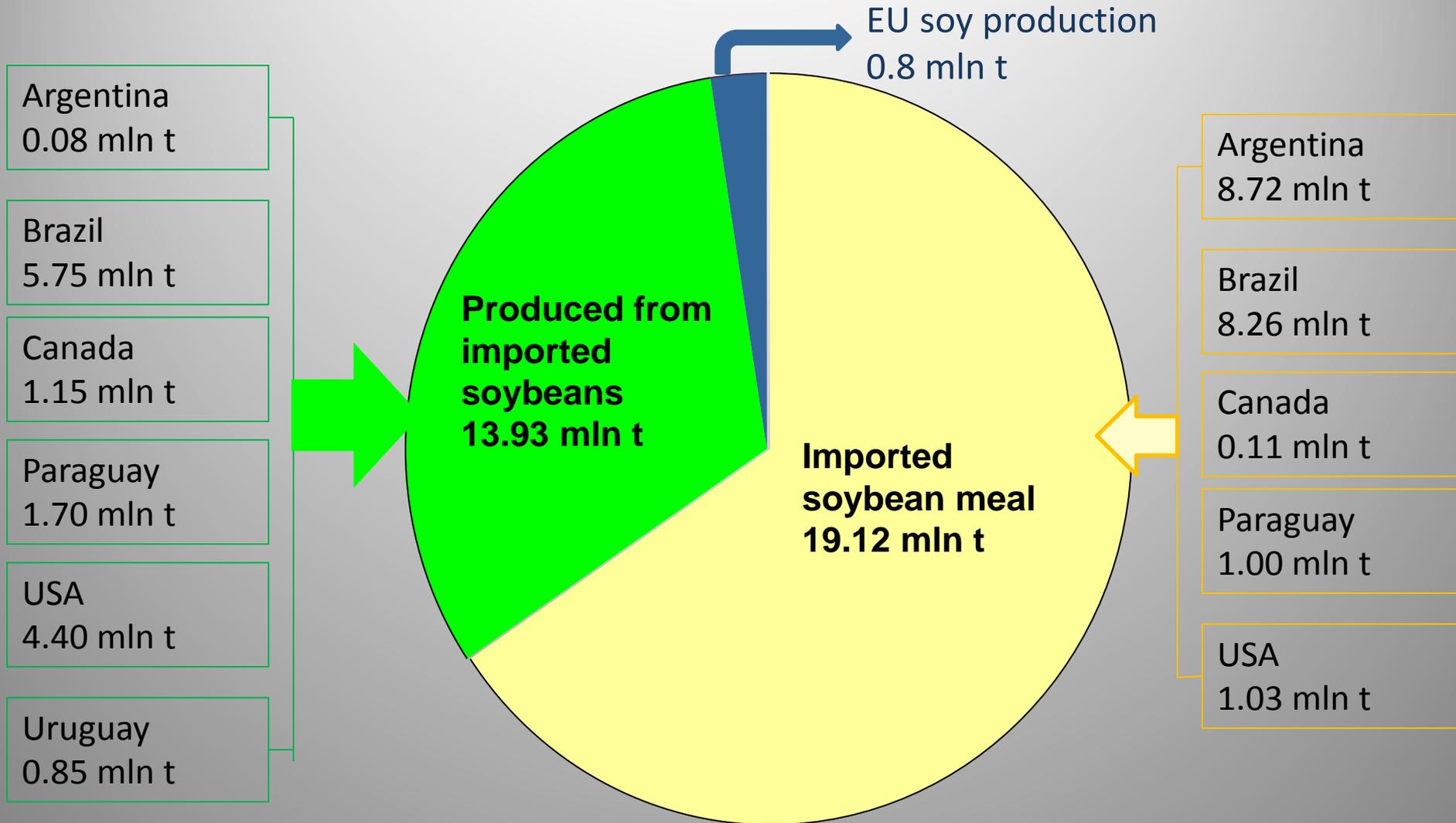
ISGA Objectives

- ISGA represents soy growers and the soy industry in Argentina, Brazil, Canada, Paraguay, Uruguay and U.S. to represent a single 'voice' in opposing market restrictions and scientifically unsound non-tariff barriers to trade relating to health, environment, chemical residues & biotechnology approvals
- ISGA's goal is to meet rapidly increasing world demand for quality, healthy soy products
- ISGA countries represent more than 90% of global soybean, soymeal, soyoil exports
- ISGA works together to develop best agricultural and environmentally-friendly practices for the entire chain

The Benefits of Biotech – ISGA View

- Improves farming practices and management
- Substantially reduces chemical use
- No-till and minimum-till farming improves soil health, water retention, reduces soil erosion and herbicide run-off
- Reduces fuel and machinery bring reductions in greenhouse gas emissions
- Biotech soy has been consumed globally for 19 years without any validated health concerns

EU Soy Imports from ISGA countries



Source: U.S. Department of Agriculture



GM Production in South America



Argentina
24.3 Million Hectares
(60 million acres)
Soybeans (100%), Maize (80%),
Cotton (100%)

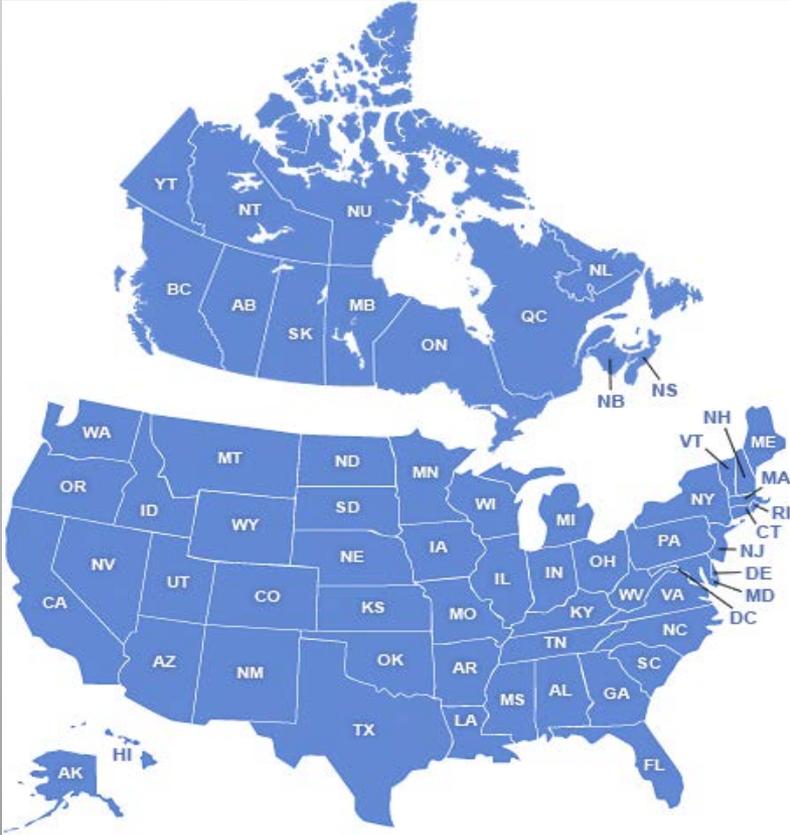
Brazil
42.2 Million Hectares
(104 million acres)
Soybeans (94%), Maize (72%),
Cotton (65%)

Paraguay
3.4 Million Hectares
(8 million acres)
Soybeans (95%), Maize (50%)
Cotton (40%)

Uruguay
1.6 Million Hectares
(3 million acres)
Soybeans (100%), Maize (83%)

Source: ISAAA, 2015

GM Production in North America



Canada
11.6 Million Hectares
(28.7 million acres)
Canola (95%), Maize (93%),
Sugar beet (96%),
Soybeans (62%)

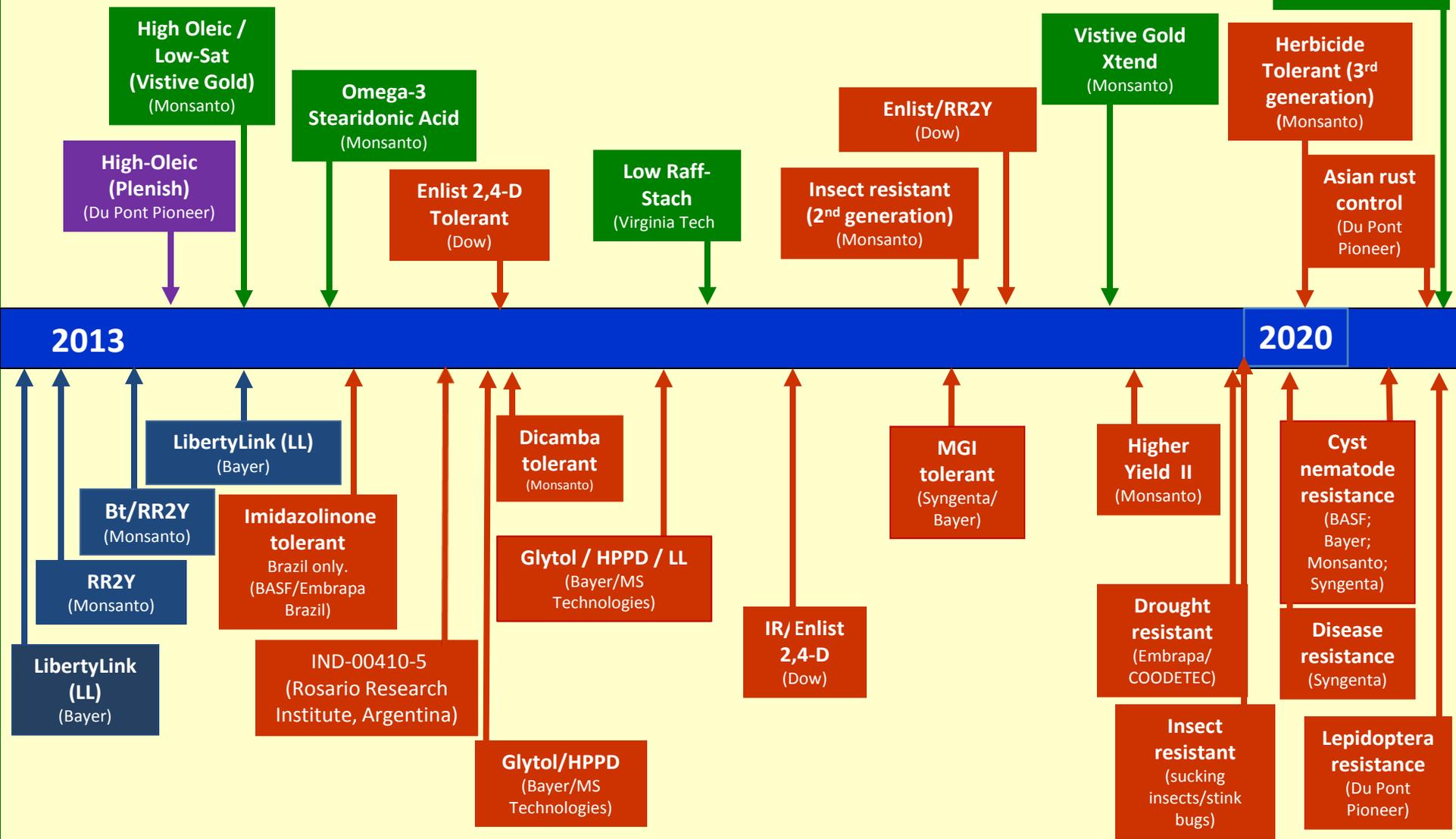
United States
68 Million Hectares
(170 million acres)
Soybeans (93%), Maize (90%)
Cotton (90%),
Sugar beet (98.5%)

Source: ISAAA, 2015

Soybean Industry Portfolio

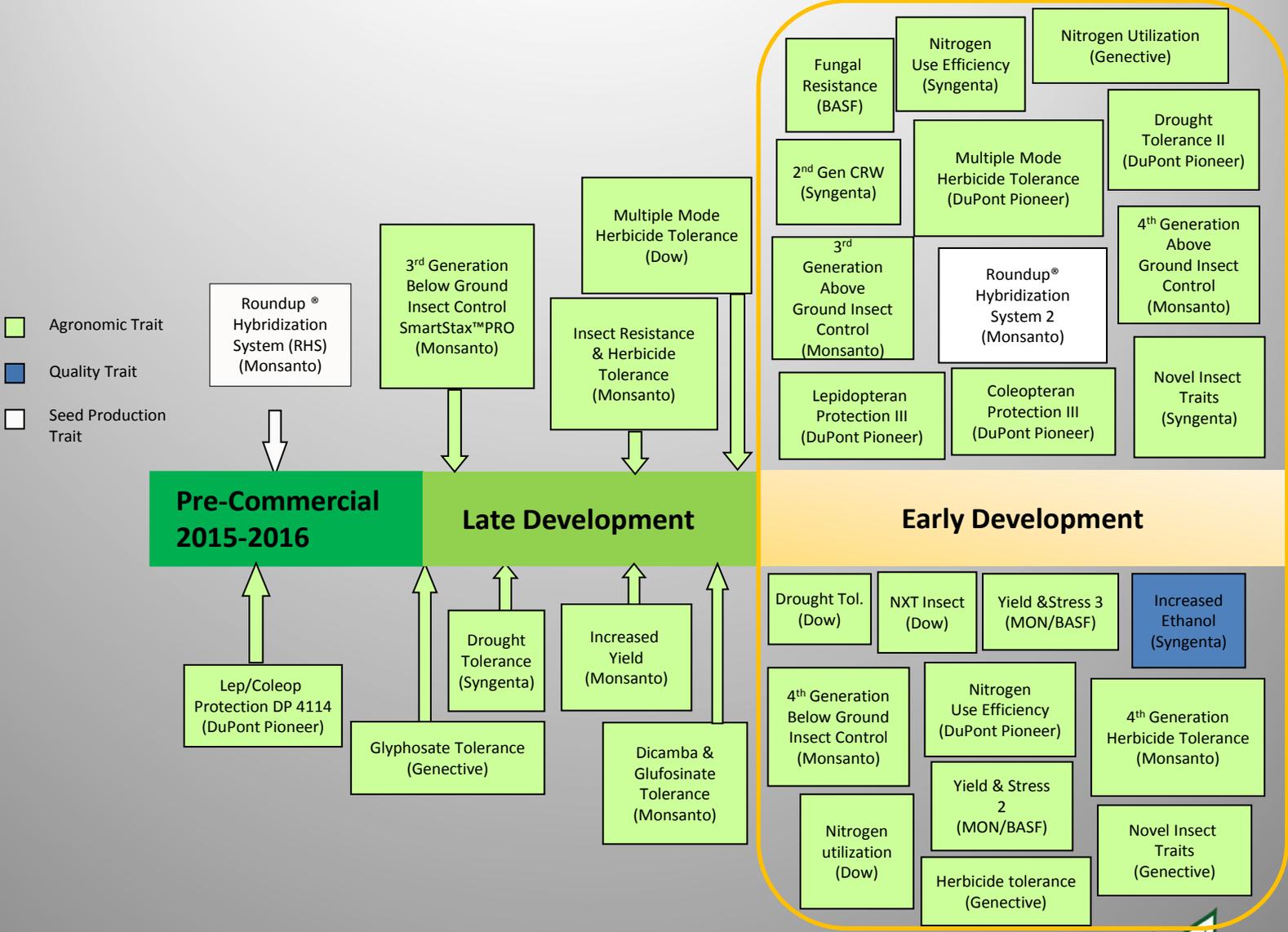
Pipeline of biotech events and novel trait releases

■ Quality/Food ■ Commercialized
■ Agronomic ■ Commercialized



Source: Pipeline information from industry & published sources: September 2015

Corn Biotechnology Portfolio*



*Estimated commercialization pipeline of corn biotech events prepared by the U.S. Grains Council
Commercialization dependent on many factors, including successful conclusion of regulatory process.



ISGA Concerns - Approvals

- ❑ Biotech adoption is increasing every year in other countries
 - Approvals in many countries are timely.
- ❑ EU approvals takes longer than many other countries
 - decisions often driven by politics rather than science.
- ❑ Farmers in the ISGA countries will use safe and innovative products when they have received authorization in their own countries and in major importing countries with functioning approval procedures.
- ❑ EU institutions and Member States should respect the legal timelines in the approvals procedure.

ISGA Concerns – ‘Opt-Out’

- ❑ The ‘opt-out’ of use of imports would create:
 - uncertainty and confusion in the supply chain;
 - inefficiencies and higher costs for animal feed
 - penalize EU poultry & livestock producers and consumers.

- ❑ ISGA countries represent 90% plus of EU imports for vegetable protein for animal all of which is GM. Non-GM is difficult to source and expensive.

Conclusion

- Biotech adoption is increasing every year in other countries.
- The EU authorization process must respect its own timelines and procedures.
- Scientific and technical assessment should be the overarching guiding principle in approvals.