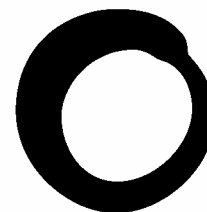


Briefing Note



**Friends of
the Earth**

Market forces

The majority of UK food manufacturers, retailers and fast food outlets have not been using GM ingredients since 1999 due to customer demand. Many have already removed ingredients derived from GM crops such as oil and lecithin. To achieve this companies have established 'identity preserved' food chains in which the source of the raw materials is known, and they are tracked from field to supermarket shelf. At present, soya and maize are the main GM crops for which alternative supplies have had to be sought because they are the only ones licensed for sale in the EU. The majority of processed foods contain soya, maize or their derivatives. The systems appear to be working well and most companies are operating to a 0.1 per cent threshold. Recent opinion polls indicate ongoing public opposition to the sale and growing of GM food and crops. It is clear that there continues to be no demand for GM food in the UK.

Market Forces at work

In 1997 the first GM foods began appearing in supermarkets. The first product was a tomato puree, sold by Sainsbury and Safeway, produced from a GM tomato with altered ripening characteristics. At the time consumer knowledge of GM was very low - less than 2 per cent of people were spontaneously aware of genetically modified foods¹. However, other research² found that despite the low level of awareness there was "considerable ambivalence in the UK towards GMO food products".

Iceland Frozen Foods was the first high street retailer to respond to consumer concerns, announcing in March 1998 their intention to remove GM ingredients from their own brand foods. Over the next 18 months, nearly all the major supermarkets, food manufacturers and caterers followed Iceland's lead. Since then many companies have taken their GM policies further to include animal feed, derivatives such as oil, and processing aids such as enzymes.

In 2002 the Consumer Association surveyed all the major food retailers, manufacturers and caterers³ to determine the extent to which these companies had successfully removed GM from their supply chains. Most companies were found to have a blanket ban on ingredients and derivatives. A Friends of the Earth survey in 2003⁴ found strong GM-free policies still in place in all major supermarkets, although progress on animal products has been slow. New legislation on traceability and labelling requiring labelling of GM animal feed should make GM-free policies in this area easier to implement.

The GM-Free Market

Despite the best efforts of the US Government, the US Soya Association and the biotechnology companies, UK food companies and many EU companies have been able to source GM-free ingredients from around the world. In doing so, they have had to abandon commodity trading in which crops from many different farms are bulked together in silos and ships before being transported to the EU. The systems developed to supply non-GM are based on identity preserved (IP) food chains. Under these systems ingredients for processed foods and animal feed are sourced from farmers known not to be growing GM crops. The movement of the harvested crop is documented all the way from the field to the processing factory and then to the food manufacturer. Companies ensure that their systems are GM-free by taking samples. Under EU law, from April 2004 any food containing more than 0.9% GM material (or 0.5% if unapproved in the EU) must be labelled. However, most companies are operating at a detection limit of 0.1 per cent and this is the level at which the EU Science

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Committee on Plants has confirmed that GM presence can be accurately detected⁵.

The Future Market

The Consumer Association's survey of major food companies indicated that considerable investment has occurred in ensuring customers' demands for GM-free foods are met. This is being extended to animal feed, where the market for imported GM crops is strongest. From April 2004 animal feed will also have to be labelled if it contains more than 0.9% GM material; a situation likely to create further growth in demand for non-GM raw materials.

The crops grown in the Government sponsored Farm Scale Evaluations in Britain: spring and winter oilseed rape, fodder maize, fodder beet and sugar beet, are used in feeding livestock. The main human foods coming from these crops are vegetable oil (from oilseed rape) and sugar (from beet), but these are unlikely to find a market in the UK or the rest of the EU at present.

Indeed, such is the confidence of the biotechnology industry in their own products that they have withdrawn all but 5 of 51 applications for approval of GM seed for sale in the UK (DEFRA Plant Varieties and Seeds Office).

Public opinion has consistently been found to be against GM food, feed and crops. The UK public debate *GM Nation?* found that more than half of the people who took part never wanted to see GM crops grown in the UK, while only eight per cent of people were happy to eat GM food⁶. This confirmed recent opinion polls such as the MORI poll in April 2003 that found 56 per cent of people opposing GM food, with just 14 per cent supporting it⁷. A NOP World poll in September 2002 for Friends of the Earth found that 63 per cent⁸ of regular honey buyers did not want honey to contain GM pollen. And the 2002 Eurobarometer poll found that the majority of Europeans do not support GM foods, as they are judged not to be useful and to be risky for society⁹. The prospects for any significant market for GM crops and food in the UK in the next few years are poor. There is time to evaluate all the options available for making the food chain sustainable.

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