• CropLife’s interest in the minor use issue

• Specialty/minor use markets in 2009
  • National markets
  • The horticulture segment
  • The GM effect

• The R&D cost of new products

• Effective solutions
CropLife promotes profitable and sustainable agriculture and believes the responsible use of crop protection products is a vital component in achieving these goals.

- Responsible use and effective regulation is underpinned by data
- Use that is not supported by appropriate data can create issues for growers and registrants.
<table>
<thead>
<tr>
<th>Country</th>
<th>Market Size 2009 ($m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>6355</td>
</tr>
<tr>
<td>Brazil</td>
<td>5439</td>
</tr>
<tr>
<td>Japan</td>
<td>3438</td>
</tr>
<tr>
<td>Australia</td>
<td>951</td>
</tr>
<tr>
<td>Colombia</td>
<td>317</td>
</tr>
<tr>
<td>Chile</td>
<td>149</td>
</tr>
</tbody>
</table>
Global Markets by Crop Type

- **Fruit and Vegetables**: 26.8%
- **Cereals**: 18.6%
- **Maize**: 12.3%
- **Soybean**: 10.4%
- **Rice**: 9.3%
- **Cotton**: 5.2%
- **Sugarbeet**: 1.5%
- **Sugarcane**: 2.5%
- **Others**: 10.0%

Source: PhillipsMcDougall 2010
Australian Horticultural Industries ($m) 2008

- Established: 98%
- New & Emerging Industries: 2%

Source: RIRDC 2009
Emerging industries

• Emerging industries make up approximately 2% of the total horticultural industry in Australia.
• Over 200 different crops involved including coffee, tropical fruits, herbs, asian vegetables and native foods.

Markets in Australia
• Native foods = $6.8m
• Herbs = $12m
The GM Effect

Agrochemical vs Biotechnology Markets ($m)

Biotechnology
10570

Agrochemicals
37860

Source: PhillipsMcDougall 2010
R&D Costs 1995 - 2008

Cost of R&D ($m)

Source: PhillipsMcDougall 2010
So for many specialty crops, the size of the industry is not an attractive market for product developers. This is particularly true in smaller national markets. Competition for research budgets with biotechnology projects will continue. Meanwhile the costs and timeframes for bringing new products to market continues to increase…
We need to implement:
- Systems Processes and Tools
- Public-Private Partnerships
- Regulatory Incentives

While recognising
- IPM
- Risks of ‘off-label’ use & third party submissions.
The first step in solving a problem is understanding it.

CropLife supports the use of systems, processes and tools to identify pests that are not adequately controlled by existing pest control options.

This may include the use of authorisation and priority pest needs databases.
Multi-party/Government-Private Minor-Use Initiatives

- Framework must be in place
- Objectives and goals must be clearly stated
- CropLife is directly involved as an equal partner
- Programs should maximise collaboration opportunities to ensure efficient use of resources
• Intellectual Property and Data Protection
• Preserving existing registrations
• Reduced fees
• Expedited reviews
• Data requirements
• Global initiatives
• Integrated Pest Management

• “Off-Label” Uses

• Third Party Submissions
Conclusions

• A number of factors prohibit CropLife members from being the sole funder of data generation for minor uses.
• Well designed public-private partnerships make real progress
• Global registration/crop grouping initiatives are also welcome…
  …but we are still going backwards in countries that lack public-private partnerships.
Together we make progress.

Individually we go backwards.
Thank You

For more information please visit www.croplifeaustralia.org.au or email daniel.quinn@croplifeaustralia.org.au