

## FOCUS: INTERNATIONAL

### Is India Ready for GM Food?

India's Bt cotton is poised for roughly 80% penetration in 2008, and industry experts expect that the trait be present on nearly every hectare of India's cotton within the next couple years. This punctuates remarkable adoption, considering that it was just released for use in 2002. Beyond accepting technology, Indian growers soon are expected to make the choice to transition from 1<sup>st</sup> and 2<sup>nd</sup> generation traits as Monsanto states it expects full market transition to BollGard II by 2012.

Context Consultant, Mark Nelson said, "The rapid pace of Bt cotton adoption shows an impressive capacity among Indian growers to recognize how new traits help them farm better."



**Context  
Senior  
Associate,  
Mark Nelson**



Context is working toward better assessment and evaluation of this market. A new white paper exploring the market, its potential and prospect, advantages and challenges, is currently under way, "***Is India Ready for GM Food?***".

Nelson is anchoring the Context study in the U.S. Regarding the Indian market and the potential for acceptance of genetically modified organisms (GMOs) in the Indian food supply, he said, "We're on an important threshold," Nelson said, "Now that Bt cotton is approaching full adoption, India stands at an important crossroads as they consider prospects for other Bt crops including food crops – Brinjal, cabbage, okra maybe even grain crops such as corn and rice. Context believes that if and/or when constituents accept GMOs in the food system, an interesting new future will unfold. A future where the discourse shifts beyond consumer apprehension to one where constituents are now experienced in weighing the benefits and risks that new technologies present to India's food security"

The white paper will explore several pertinent and timely considerations:

- Do these GM seed developments in cotton foreshadow broad GM acceptance in India?
- Will these development in non-food crops, spill over in to food crops?
- Have there been developments that would suggest a different outcome for future GM food crop seed traits than the fate of GM mustard?

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Context Senior Associate,  
Mark Nelson

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Nelson said, "In 2007, India's Supreme Court cleared Bt Brinjal for trials and experimental seed production of Bt Brinjal positions it for market introduction in 2009. Indian government also has recently approved processed food containing GMOs and exempted it from regulatory approval." He said this leaves the marketplace facing several crucial questions:

- Do these regulatory developments clear the way for Bt Brinjal?
- Will Bt Brinjal be India's first commercial GM seed trait approved for food crops?
- What implications will this have for other food crops, wherein seed traits are poised in development pipelines?

This white paper will describe the status of Indian constituents as they undergo the later acceptance stages of a GM trait in their food supply. The study outline is as follows:

- I. Status check of GM traits in food crops, approaching commercialization
    - Identification of traits (perhaps types of traits) and trait providers
    - Pipeline/timeline illustrations on traits approaching commercialization
  - II. Status check of GM traits in food crops, approaching commercialization
    - Identification of traits (perhaps types of traits) and trait providers
    - Pipeline/timeline illustration on traits approaching commercialization
  - III. Status check of GM traits in food crops, approaching commercialization
  - IV. Past Indian experiences with GM traits in food crops
    - Profiles on what has happened, such as GM mustard
  - V. Developments among key constituents that will shape future outcome
    - Leading up to a net-net illustration on the net balance of influence
- 1) Consumers
    - food prices / crises
    - GM food acceptance
  - 2) Regulators
    - general public policy
    - technology regulating body(ies)
    - price controls
  - 3) Technology providers
    - private sector in-India providers
    - private sector ex-India providers
    - public sector providers
  - 4) Farmers
    - Willingness to plant GM seeds
    - Economic impact of planting GM seeds

For more information on this white paper, contact Mark Nelson at [mark.nelson@contextnet.com](mailto:mark.nelson@contextnet.com).

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**The Context Network** provides business management and strategy consulting services to the world's leading agriculture, biotechnology and food companies and government agencies and institutions. Major areas of expertise include strategy, merger and acquisition support, valuation of new technologies, formation of alliances, and market research. The West Des Moines-based firm is composed of a core of professional consultants that is complemented by a network of more than 100 industry and subject-area experts.