

Terms of Reference – Review of the South Australian GM Food Crop Moratorium

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South Australia currently has a moratorium on the commercial cultivation of GM food crops which is scheduled to continue until 2025. The practical impact of the moratorium has been to restrict grain producers from using GM canola varieties in South Australia, where those varieties have been available for use in neighbouring states. The moratorium has been justified to the South Australian grains industry and public on the grounds maintaining a GM-free status would deliver an economic premium to the state's agricultural and food production industries.

This Review is to investigate the benefits and costs of the moratorium to the state of South Australia and to the state's agricultural and food production industries, and to consider whether it is in the interests of maximising the state's economy and of maximising returns for the state's agricultural and food production industries for the moratorium to continue, and if so, under what conditions.

The Review will:

1. Assess available evidence on the market benefits of South Australia's moratorium on the commercial cultivation of GM crops.
2. Assess the degree of awareness of South Australia's moratorium by key trading partners and food production businesses operating in South Australia and other Australian states.
3. Where there is evidence of market benefits resulting from the moratorium, examine whether it is possible to retain such benefits for industry through the use of systems of segregation in the supply chain, having regard to segregation protocols adopted in other jurisdictions.
4. Consider evidence from South Australian businesses and industry, market and trade data, the experience in other Australian and international jurisdictions and other relevant evidence to inform the analysis.
5. Explore whether there are potential innovations likely to be available for commercial adoption by South Australia's agricultural industries prior to 2025 that would justify a reconsideration of the moratorium on grounds of economic benefit to the state.
6. Quantify where possible the economic costs and benefits of maintaining, modifying or removing the moratorium, not limited to but including on-farm impacts, food manufacturing, supply chain costs and impacts on research and development investment in South Australia.

Under a policy principle established within the *Gene Technology Act 2000*, the current SA moratorium exists for trade and market access purposes.

Outside the scope of this review are matters that are the responsibility of regulatory agencies in other jurisdictions, such as matters relating to the human health, safety and environmental impacts of GM crops.

