Session Three
Pest Disease Control Strategies, Integrated Production Systems and the Impact on Market Access

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Chemical Access issues for Avocados

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Chemical Access

Gaining and maintaining access.

The issues:
* The changing face of the Agchem industry
* The regulatory environment
The changing face of the Agchem industry

- Merger Mania
- The 'blockbuster' mentality
- ‘World’ crop focus
- Generics and ‘minor’ crops
Chemical Access

Mergers

Syngenta 2000

Novartis
Merck 1997
Novartis 1996
Ciba-Geigy
Maag 1994

AstraZeneca 1999
Zeneca 1993
ICI
Stauffer 1987

Avery Crop Sciences 2001
Bayer Crop Sciences
Aventis 2000
Astra

AGREVO 1994
Schering
Hoescht

Rhone-Poulenc

Syngenta

Dow Agrosciences

Rhome & Haas 2001
Union Carbide 1999

Mycogen 1998

DowAgrociences 1997
Sentracem 1997

DowElanco 1989

Dow Chemicals
Eli Lilly
The Regulatory environment:

Risk Assessments - Food Quality & Safety
Reviews – International & Domestic
- Europe - 91/414/EEC
- USA – FQPA
- CODEX – Periodic Re-evaluation
- Australia – Chemical reviews
The *Regulatory* environment:

AUSTRALIA
- Toxicology, Environment, OH&S, Residues & Trade
- Dietary intake to have significant impact.
- Currently 29 chemicals at various stages of review
The Regulatory environment:

EUROPE
- Over 380 compounds withdrawn
- EU Harmonised MRLs
The **Regulatory** environment:

**CODEX**
- Pesticide MRLs Reviewed by JMPR
- New chemicals & Periodic re-evaluations
- Toxicology & Residues
- Manufacturer support??
Chemical Access

Impact:

- Available chemical options reduced
- Global problem
- Data availability a problem
- Industries having to take responsibility
Chemical Access

What is being done?

- **Internationally**
  - USA IR-4 & NAFTA harmonization on MU
  - Europe – Country & EU initiatives on minor use.
  - Codex Interim MRLs
CONCLUSIONS:

- Partnerships needed

- Industry involvement necessary