Please visit our website,

Jaca.jp

Activity started from Dec 2019 (3+ yrs)

Legally established in Dec 2022

c.60 organization members

(Over 50 are corporates)

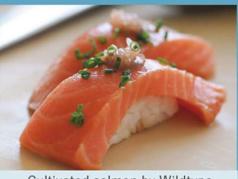


Confidential, For the Cellular Agriculture Europe-hosted webinar on 24 August 2023 only

Cultivated Seafood*



Cultivated Bluefin Tuna Toro by BlueNalu



Cultivated salmon by Wildtype

About Japan Association for Cellular Agriculture (JACA)

. .

JACA aims to contribute to key issues in Japan, such as food security and sustainability, by collecting information, as well as establishing and executing strategies and measures on how Japan should face growing cellular agriculture. Not only we are active domestically, but also we are to contribute to the international discussion by sharing our progress in one of the key areas globally.

Domestic

Startups





IntegriCulture Inc.

Diverse Farm

Food majors



HFGサポート株式会社

Eat Well, Live Well.



Ajinomoto Co., Inc.

Ichimasa Kamaboko



NH Foods Ltd.



Japan Tobacco Inc.



House Foods Group Inc.



Maruha Nichiro Corporation

HOLDINGS INC.



Meiji Holdings Co., Ltd.

MEGMILK SNOW BRAND Co., Ltd.



YOKOHAMA OILS & FATS INDUSTRY CO LTD.

Packaging technology companies



Toppan Inc.

Toyo Seikan Group Holdings, Ltd.

Retailers



Seven & i Holdings Co., Ltd.

Trading Company



Sumitomo Corporation

Marubeni

SANCT Corporation.

SUMITOMO CORPORATION

Marubeni Corporation.



Mitsubishi Corporation.

Logistics Lifescience companies **kuraray** Asahi KASEI MITSUI-SOKO Asahi Kasei Sumika Chemical HOLDINGS Co., Ltd KURARAY CO, LTD. Corporation. Analysis Service, Ltd. Law firms 日本触媒 🥏 **NISHIMURA** NIPPON SHOKUBAI & ASAHI TOYOBO CO, LTD. Myoridge Co. Ltd. CO, LT Nishimura & Asahi **TMI Associates PeptiGrowth** Venture capitals Nissan Chemical Nissan Chemical PeptiGrowth Inc. Corporation (value create Value Create Inc. Future Food Fund Inc. **FUJIFILM Corporation** Canon Inc. Creative Bioreactor / manufacturing equipment GÉODE INC. GEODE Inc. **FUJIMORI KOGYO** DAI-DAN Co., Ltd. CO,LTD.

Consulting Services

SIGMAXYZ

Manufacturing systems



Yokogawa Electric Corporation 式会社シグマクシス

International

Overseas companies

Aleph Farms®

S Blue∩alu.

Aleph Farms

BlueNalu, Inc.

Finless Foods







Forsea Foods, Ltd.

GOURMEY

Umami Bioworks

California Cultured Inc.

Mosa Meat

Upside Foods

Wildtype

Academia

Prof. Aiko Hibino,

Faculty of Humanities and Social Sciences, Hirosaki University

Prof. Shoji Takeuchi,

Institute of Industrial Science, The University of Tokyo

Prof. Tatsuya Shimizu,

Director, Professor, Institute of Advanced Biomedical Engineering and Science, Tokyo

Women's Medical

Prof. Michiya Matsusaki,

Graduate School of Engineering, Osaka University

Exposure to National television (2021~22)



もこれのうていくことになる。 細胞そのものについては、畜産農家の権利を 守り、価値を付与した世級み作りが必要だ。トレ ーサビリティに関しては、ほかの業界の枠組み も参照にしつつ、考えていく必要がある。

の考え力や要件について、ことし冬までにある 程度意見をまとめる予定だ。それらの内容に基



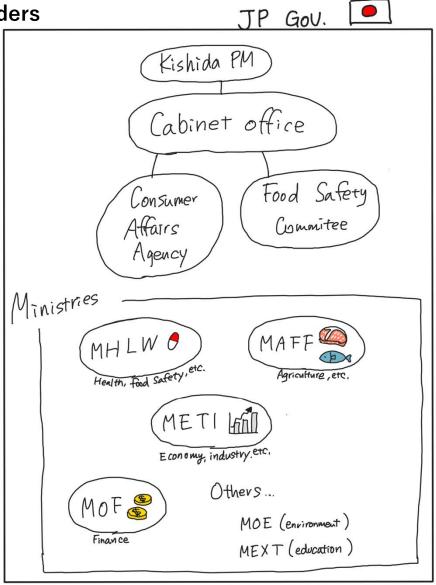
第1部: SDG s 17の目標には「飢餓をゼロに」がある。世界は将来的に食...

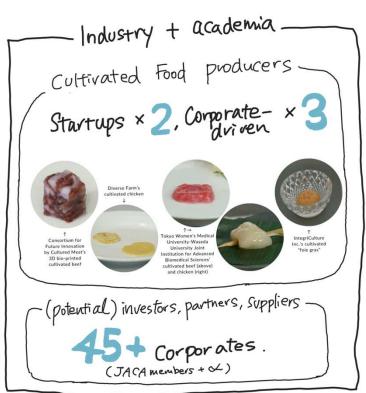
Exposure to Meat Industry Newspapers (2023)



Going to talk to Japan Meat Market Wholesaler's Association this month!









JACA
(Cell-Ag)

Keidanren (JPeonomy)

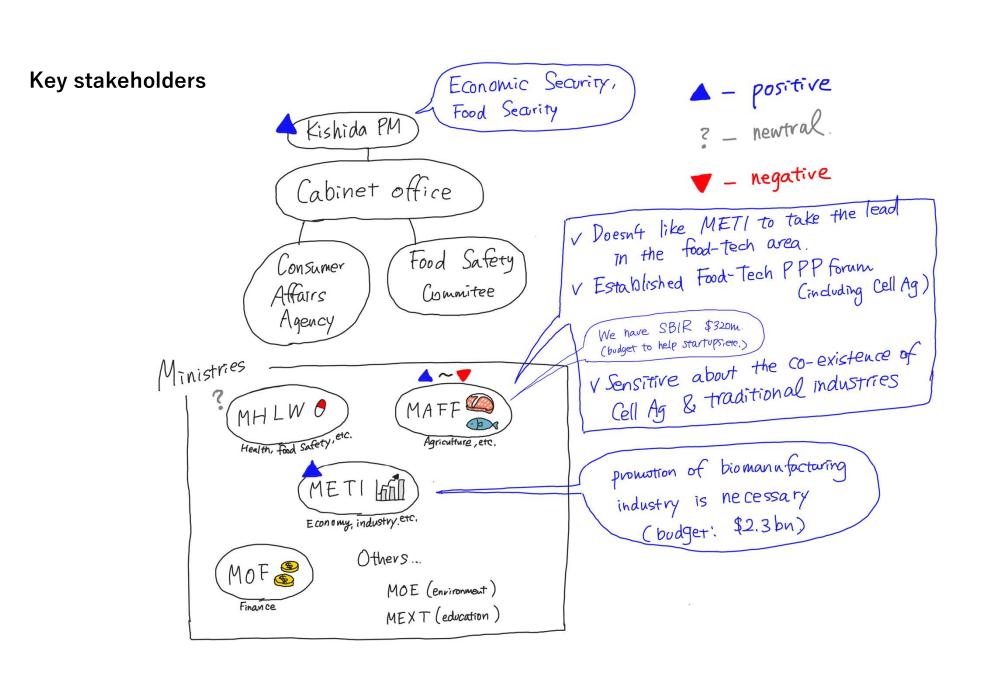
JBA (Bioindustry)

Existing — Industries

Meat, Seatood, etc.

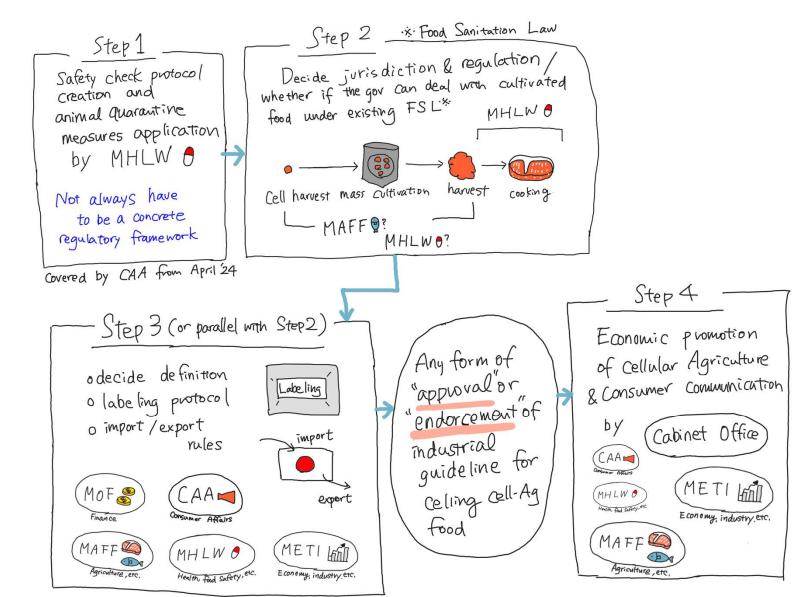
-Consumer Org.

5 influential organizations,



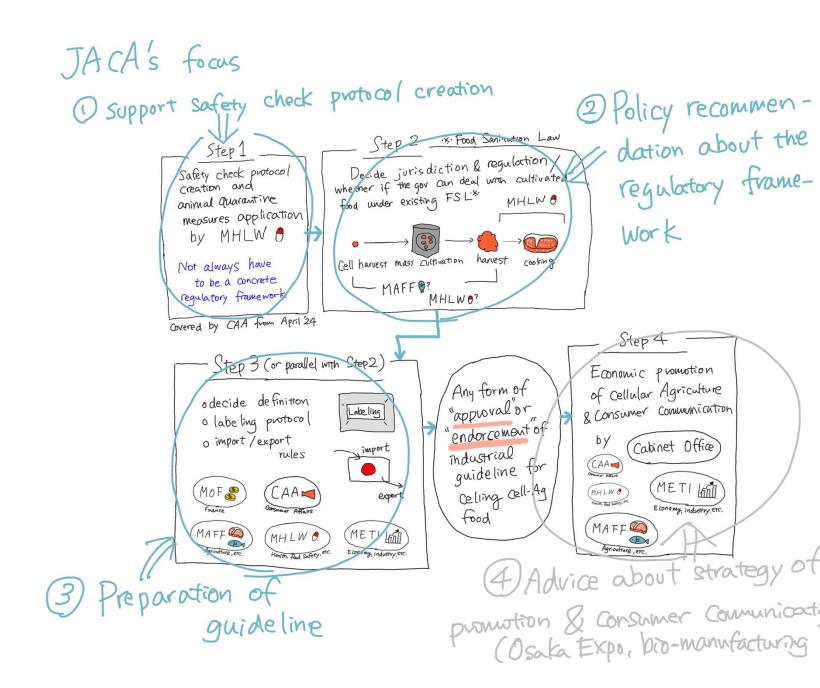
What JP government need to do for us to sell cultivated food in Japan

- 1) MHLW need to create safety check protocol
- 2) MHLW and others need to discuss whether we need regulatory framework and jurisdiction
- 3) Import/export and labeling rules will be prepared
- 4) Any form of official announcement to allow selling products
- 5) MAFF and METI to promote the industry



Our ongoing projects are

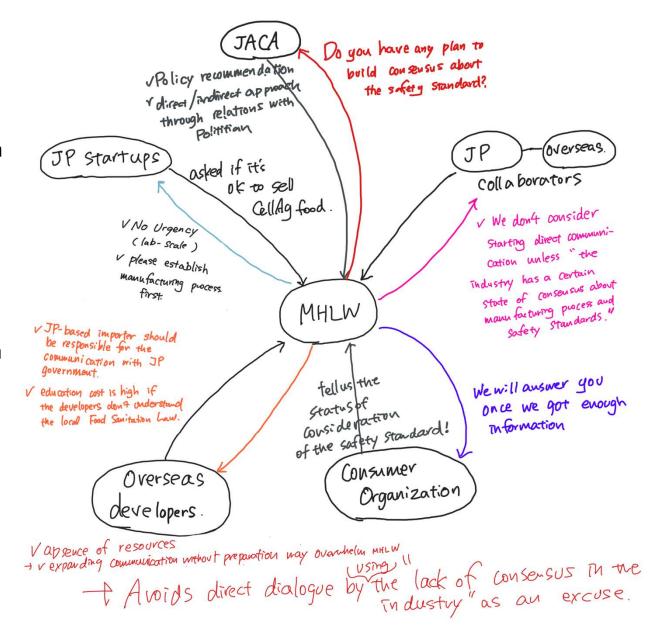
- **1**Support safety check protocol creation of MHLW
- 2 Policy recommendation about the regulatory framework
- **3**Preparation of guideline
- 4 Advice METI about the strategy of promoting Cell Ag industry



1Support safety check protocol creation of MHLW

Collecting safety-related information is pretty important for MHLW to proceed ①, however, they avoids direct dialogue with developers by excusing that "there are lack of consensus in the industry [about safety measures, etc.] and it's too resource consuming for us to manage all the communications with developers".

We tried many types of communications to encourage MHLW to start dialogue with developers, but they avoided them by various reasons →



1Support safety check protocol creation of MHLW

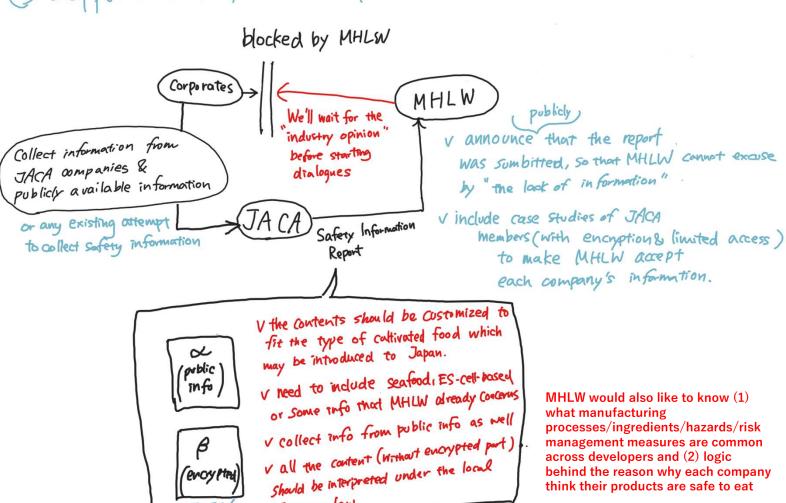
Since MHLW blocks the option of developers directly communicating with MHLW,

JACA is trying to collect information of how each company understands that their product is safe, and submit it as Safety Report.

There are some requirements that MHLW gave or implied for us to cover in the safety information report \rightarrow .

We will publicly announce that we submitted enough information at maximum effort so that MHLW cannot excuse any more about the lack of info (1) Support safety check protocol creation.

Japanese law.



think their products are safe to eat

2 Policy recommendation about the regulatory framework

We drafted policy recommendations \rightarrow

> **Proposals** (Next page)

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-BURNABURAS

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A DESCRIPTION AND ADDRESS OF THE PARTY OF TH

(2) Policy recommendation about the regulatory framework

(2) Policy recommendation about the regulatory framework.

v accept information from overseas developers

Increase the no. of team for Cell Ag food

V accelerate your understanding about the safety

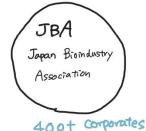
V prepare for the rules to import cultivated food

V Set up a reporting line across Ministries to speed up discussions

JACA drafted a policy We asked external recommendation Covering... industrial organizations We asked external to harmonize policy recommendations about biotechnology and alternative food pumotion



1500+ corporates, income \$45m (2020)

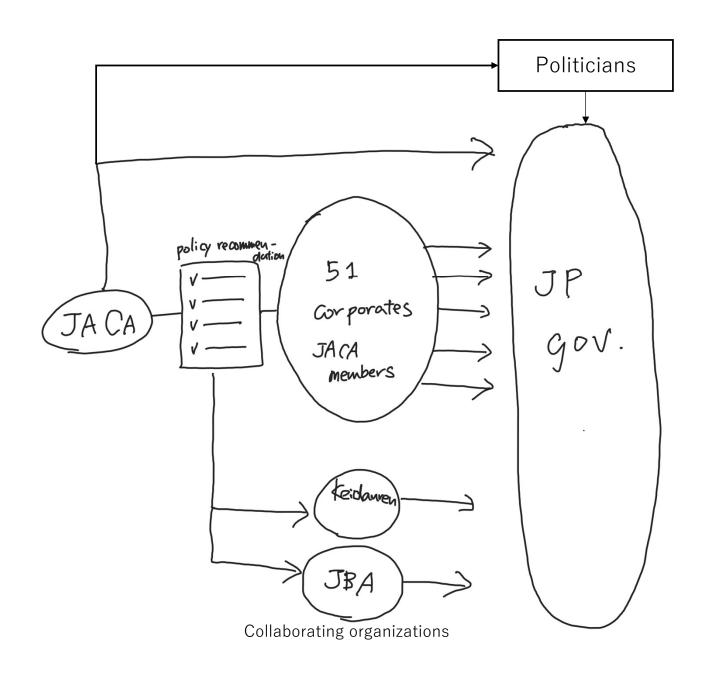


400+ corporates

2 Policy recommendation about the regulatory framework

We will make use of the wide network in Japan to push the recommendation forward through Politicians, JACA members corporates, and collaborative partner organizations.

The recommendation will be also used as the harmonization guideline of each JACA member's communication strategy with the JP government.



Proposals – screenshot time

Proposal to MHLW

- I. As part of the transfer of food safety responsibilities from the Pharmaceutical and Food Safety Bureau of the Ministry of Health, Labour and Welfare to the Consumer Affairs Agency, the urgent task is to include discussions on the safety of cell-based foods as a handover item.
- II. For companies considering the market release of cell-based foods, establish a pre-consultation point (a window for individual information confirmation in a simulated review process) and build a system to accept the latest technological information from companies developing cell-based foods (even from overseas companies)
- III. Establish a relevant / resource-rich team for considering crucial matters in the cell agriculture industry
- IV. Deepen the discussion on safety check process for cell-based foods.
- V. By the winter of 2024, provide a template for companies to organize matters necessary for the sale or sampling of cell-based foods in the form of "guidelines" or similar resources.

Proposal to MAFF, METI, MHLW, MOF

- I. Enhance collaboration between government ministries and agencies (e.g., by establishing communication councils across relevant ministries and agencies) to share information about technological prospects and societal impacts of cell agriculture, as well as the status of policy development in each ministry.
- II. Further delve into the classification and labeling standards of cell-based foods, and clarify the national policies and progress status to consumers / corporates
- III. Begin discussions on the framework for import and export, including the manufacturing and sale of cell-based foods domestically, and clarify progress and points of consideration

Proposal to MAFF and METI

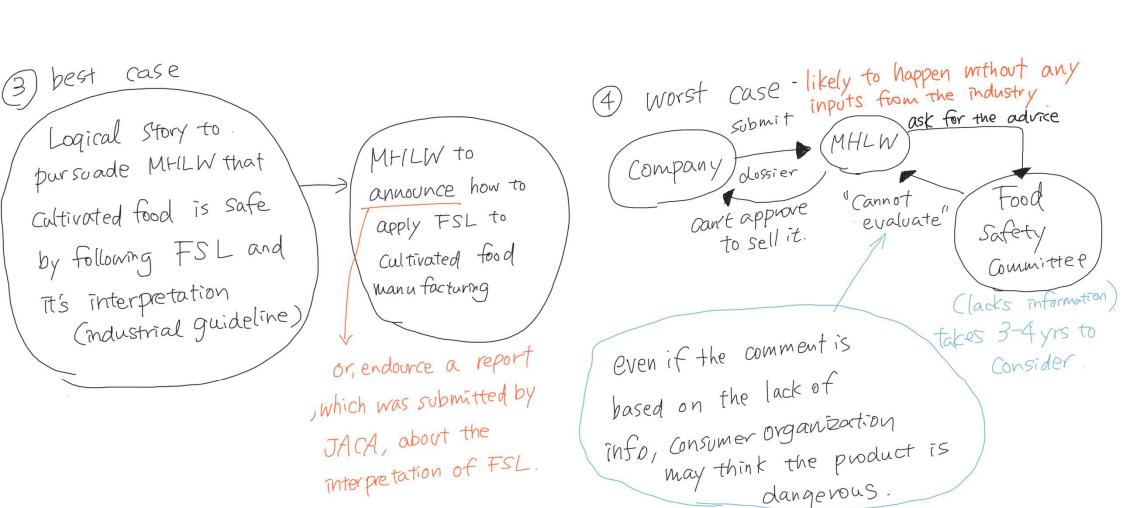
- I. Accelerate discussions on the arrangement of rights for producers of ingredients when cellular components of premium ingredients are used in cell-based foods, and examine necessary frameworks
- II. Consider establishing an internationally led conference by Japan to shape the international market for cell agriculture, ensuring Japan's strengths in its food culture and technology in the medium to long term
- III. Consider proactive measures and opportunities for cooperation between the public and private sectors to enhance communication and promotion for encouraging consumers' accurate understanding

2Policy recommendation about the regulatory framework

We assume Japan's local regulatory framework for "Gene Edited Foods" would be sufficient for the framework,

Though we don't actively propose it by using "gene editing framework", but we are more focused on the importance of opening up the pre-consultation opportunities for developers

Possible regulatory frameworks 1. Pre-consultation Company edited Giene i. pre-Consultation. Company 2. submit a form Consumers. 3. Start Selling (,2 is not mandatory.



Justifying cultivated food by interpreting FSL

3Preparation of guideline

3 pre paration of quideline. (other than safety report, etc.)

labeling & IP of cells definition Committee commîtee how to treat the rights of farmers on some branded led by food's cells like Nishimura Wagyu led by Asahi TMI Associates Law Firm Japan & top 5 Law Firms