
Description:

The battle between pro- and anti-GMO forces shows no sign of abating. If anything it seems to be getting more intense. In the U.S., 80% to 90% of such key crops as corn, soybeans, and cotton are grown from genetically modified (GM) seeds and there is little effort by anti-GMO forces to undo those facts on the ground. Instead, there is bitter conflict over attempts to have foods made using ingredients from genetically modified organisms (GMOs) labeled as such.

Rather than focusing on labeling food products, in Europe and through the rest of the world where GM crops have been widely banned, an epic struggle is taking place over those bans. On one side are environmentalists and health advocates who would keep and extend the bans. On the other side are agricultural experts and the GM seed companies who want to see the bans removed. On both sides are farmers, non-governmental organizations, and politicians of differing opinions.

Why the uproar? Much of it has to do with whether the research indicating that GMOs are not harmful to humans is conclusive. Those supporting the use of GMOs point not only to extensive research studies indicating their safety but also to the fact that there is no evidence of any harm to human consumers in the two plus decades that GMOS have been in use. Opponents reject this argument, questioning the validity of the research, noting a lack of peer review, despite approvals from leading U.S. and European health agencies, and suggesting that the period of use is too short to have provided adequate data.

Another concern, and one that is proving to be less debatable, is the impact of more widespread herbicide and pesticide use on humans and the environment. These products are being used to a greater degree because the GM crops can resist them and the World Health Organization's International Agency for Research on Cancer classified glyphosate, the key ingredient in Monsanto's best-selling Roundup herbicide, as "probably carcinogenic in humans." Monsanto has protested the accuracy of WHO's findings but in both Europe and the U.S. a movement is underway to end the use of this product. This might possibly be an opening towards diminishing the need for Roundup resistant crops.

Packaged Facts' report Non-GMO Foods: U.S. and Global Market Perspective, 2nd Edition reviews the stakeholders in the controversy, both pro- and anti-GMO, and the current intensifying conflict between them in the courts, legislatures, fields, stores, and restaurants in the U.S. and around the globe. The report also reviews new non-GMO food and beverages, as well as recent breakthroughs in GM foods and the reaction to them. In addition, the report offers growth projections for non-GMO food sales in the U.S. and global markets and the results of an exclusive national online consumer survey regarding their beliefs about GMO foods.

Scope and Methodology

Non-GMO Foods: U.S. and Global Market Perspective, 2nd Edition covers the market for non-GMO products sold through all types of retail outlets. Market estimates within this report were based on both public and syndicated data sources. The report analyzes available sales and trend data, together with information pertaining to those products that move through unmonitored outlets, to estimate the total non-GMO market size.

Data sources used and/or consulted for market, sales, and consumer estimates include:

- IRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of $2 million or more.
- U.S. Census Bureau retail food sales data from the Economic Census surveys, annual retail channel sales, non-employer statistics.
- U.S. Bureau of Economic Analysis annual estimates for consumer spending by food type.
- The Experian Marketing Services (Experian Information Solutions, Inc.), Winter 2015 NCS Adult Study 12-month Major food and beverage retailer annual reports for individual retailer sales.
- The report also draws on a proprietary national Consumer Survey, conducted in June 2015 with a sample size of 2,000 U.S. adults age 18+.

The sample composition is representative of the national population by gender, age bracket, geographic region, race/ethnicity, household income bracket, and presence of children in the household.
Information on new product introductions was derived from examination of the retail milieu and from relevant trade, business, and government sources, including company literature and annual reports.

Contents:

Chapter 1: Executive Summary
Scope of This Report
Methodology
Consumer Information
Background and Issues
Antagonism Between Pro- and Anti-GMO Forces Not Easing
Stakeholders
Regulatory Developments
Market Developments
Table 1-1 U.S. Retail Sales of Non-GMO Foods and Beverages, 2014-2019 (in billions of dollars)
Table 1-2 Global Retail Sales of Non-GMO Foods and Beverages, 2014-2019 (in billions of U.S. dollars)
Product Developments
Retail and Foodservice Developments
Consumer Attitudes and Concerns
Table 1-3 Avoidance of GMO Grocery Products, 2013 vs. 2015 (percent of U.S. adults)
Figure 1-1 GMO Grocery Products: Attitudes and Actions, 2015 (percent of U.S. adults)
Chapter 2: Background and Issues
Key Points
GMOs—The Background
What are GMOs?
History and Development
GMOs a Continuation of Agricultural Development
Development of Genetic Theory
Why Are GMOs Controversial?
What Motivates Anti-GMO Activists?
GMOs and Organic Products
Avoiding GMO Content Increasingly Important to Organic Buyers
GMO Crops
Dominance of GMO Crops in U.S.
Table 2-1 GMOs As Percent of Total Corn Varieties Planted by Key State and United States, 2000-2014
Figure 2-1 GMOs As Percent of Soybean and Cotton Crops Varieties in the United States, 1996-2014
Issues
The Core Issue: Are GMOs Safe?
Another Round of Research
Political, Social, and Economic Safety of GMOs
The Pope Weighs In
GMOs and the 2016 Election
U.S. vs. Global Attitudes
In the U.S.: Label Rather Than Ban
Lawsuits Used to Promote GMO labeling
In Europe
In Asia and the Pacific
In Emerging Nations
Non-GMO Rides the “Free-From” Wave
Illustration 2-1 Introducing Foster Farms Simply Raised
Can There Be Agreement?
Chapter 3: Stakeholders
Key Points
Stakeholders Represent Contrasting Points of View
Consumers
Farmers
Are U.S. Farmers Turning from GMO Seeds?
U.S. Government Agencies
Food and Drug Administration ([external URL])
Environmental Protection Agency ([external URL])
U.S. Department of Agriculture ([external URL])
International Organizations
Food and Agriculture Organization of the United Nations ([external URL])
World Health Organization ([external URL])
European Commission
Food and Ingredient Manufacturers
GMO Food and Ingredient Companies
AquaBounty Technologies ([external URL]
Archer Daniels Midland ([external URL]
BASF Plant Science ([external URL]
biootechnology/plant-biotechnology/index)
Bayer CropScience ([external URL]
ConAgra ([external URL]
Dow Agrosciences ([external URL]
DuPont ([external URL]
Monsanto ([external URL]
PepsiCo ([external URL]
Syngenta ([external URL]
Food Companies
Giant Corporations Work Against GMO Labeling
Organic Companies Oppose GMOs
Amy's Kitchen ([external URL]
Clif Bar & Company ([external URL]
Frontier Natural Products Co-op ([external URL]
Lundberg Family Farms ([external URL]
Mercola Health Resources ([external URL]
Nature's Path ([external URL]
Organic Valley ([external URL]
Stonyfield Farm ([external URL]
Food Retailers
Whole Foods ([external URL]
Trader Joe's ([external URL]
Walmart ([external URL]
Pro-GMO Organizations and Associations
Biology Fortified, Inc. ([external URL]
Biotechnology Industry Organization ([external URL]
Center for Science in the Public Interest ([external URL]
Council for Biotechnology Information ([external URL]
CropLife International ([external URL]
Genetic Literacy Project ([external URL]
Grocery Manufacturers Association ([external URL]
The Institute of Food Science & Technology ([external URL]
International Service for the Acquisition of Agri-biotech Applications([external URL]
Organizations and Associations Questioning GMOs
African Biodiversity Network ([external URL]
The Alliance For Food Sovereignty in Africa ([external URL]
Center for Food Safety ([external URL]
Committee for Independent Research and Information on Genetic Engineering ([external URL]
Consumers Union ([external URL]
Danube Soya ([external URL]
Illustration 3-1 Danube Soya Logo
European Consumer Union ([external URL]
European Network of Scientists for Social and Environmental Responsibility ([external URL]
European NGO Network on Genetic Engineering ([external URL]
Illustration 3-2 GENET Logo
Friends of the Earth ([external URL]
GMO Free Canada ([external URL] home/mainPage)
Illustration 3-3 GMO Free Canada Logo
GMO Free USA ([external URL]
Illustration 3-4 GMO Free USA Logo
Institute for Responsible Technology ([external URL]
Just Label It! ([external URL]
Natural Products Association ([external URL]
Organic Trade Association ([external URL]
Verband Lebensmittel ohne Gentechnik e.V.([external URL]
Illustration 3-5 VLOG Logo
Testing and Certifying Organizations
Chapter 4: Regulatory Developments

Key Points
- United States
  - Federal Level
    - The Safe and Accurate Food Act
    - House of Representatives Approves Act
    - Impact of DARK Act On State Action
    - GMO-Related Developments
  - States
    - Vermont Takes the Lead

Illustration 4-1 Excerpt From Vermont GMO Labeling Law, 2014 Vt. Acts & Resolves No. 120

- GMA Predicts Disaster
- Global Regulatory Developments
  - Canada
  - Europe
    - European Court of Justice is the Decider
    - Trade Agreements Factor in Policies
    - Examples of European Diversity on GMOs
  - France
    - GMO Lamb Stirs a Crisis in France
  - Germany
  - Hungary
  - Russia
  - Ukraine
  - United Kingdom
  - Africa and Middle East
    - Burkina Faso
    - Ethiopia
    - Ghana
    - Kenya
    - Namibia
    - Nigeria
    - South Africa
    - Uganda
    - Zambia
  - Zimbabwe
  - Asia/Pacific/Australia
    - Afghanistan
    - China
    - India
    - Australia and New Zealand
    - Tasmania
    - Thailand
    - Latin America
    - Brazil
    - Costa Rica
    - Mexico
    - Peru
Chapter 5: Market Developments

Key Points
- U.S. Market Developments
- Size of U.S. Non-GMO Market
- Majority of Non-GMO Sales from Organic and Natural Foods and Beverages
- Table 5-1 U.S. Retail Sales of Non-GMO Foods and Beverages, 2014-2019 (in billions of dollars)

European Market Developments
- Global Non-GMO Market Projected to $1 Trillion by 2019
- Table 5-2 Global Retail Sales of Non-GMO Foods and Beverages, 2014-2019 (in billions of U.S. dollars)
- U.S. Share of Global Non-GMO Market Will Hold at About One-Third
- Table 5-3 Global Retail Sales of Non-GMO Foods and Beverages, 2014-2019 (in billions of U.S. dollars)

Non-GMO Growth Through Acquisitions and Mergers

Chapter 6: Product Developments

Key Points
- Non-GMO Products Proliferate
- Increasing Demand for Non-GMO Labeling in Europe
- Non-GMO Project Tightens Guidelines
- New GMO Products Tout Safety
- Okanagan Specialty Fruits Inc
  - Illustration 6-1 Arctic Apple
  - Protests Against Arctic Apple Already Underway
  - Illustration 6-2 Arctic Apple Opposition
- J.R. Simplot
- Illustration 6-3 Innate Potato
- Illustration 6-4 Innate Potato Opposition
- GMO Research Goes On
  - New Non-GMO Products
  - Table 6-1 Selected Non-GMO Products
- Wonderfully Raw
  - Illustration 6-5 Wonderfully Raw Brussel Bytes
  - Setton Pistachio
  - Illustration 6-6 Setton Farms Pistachios
  - SkinnyPop
  - Illustration 6-7 Skinny Pop Popcorn
  - Cornfields: Cretors Popcorn
  - Illustration 6-8 Cretors Popcorn
  - Tasty Brand Inc.
  - Illustration 6-9 Tasty Brand Sandwich Cookies
  - MySuperFoods Company
  - Illustration 6-10 MySuperCookies
  - Pretzel Pete, Inc
  - Illustration 6-11 Pretzel Pete Nuggets
  - Funley's
  - Illustration 6-12 Funley's Super Crackers
  - Ozery Bakery
  - Illustration 6-13 OZERY Morning Mounds
  - Barbara's
  - Illustration 6-14 Barbara's Better Granola
  - Green Grass Foods
  - Illustration 6-15 Green Grass nutpods Dairy-Free Creamer
  - KeVita
  - Illustration 6-16 KeVita Master Brew Kombucha
  - MycoTechnology
  - Illustration 6-17 MycoTechnology Green Coffee Tea
  - King's Cupboard
  - Illustration 6-18 King's Cupboard's Dessert Sauces
  - Polaner All Fruit
  - Illustration 6-19 Polaner All Fruit
  - Suzanne's Specialties: Non-Certified Non-GMO
  - Illustration 6-20 Suzanne's Specialties Organic Agave Syrup
  - Creminelli Fine Meats
  - Illustration 6-21 Creminelli Sevenhams ProsciuttoCotto
  - Abbott Laboratories
Chapter 7: Retail and Foodservice

Key Points

Non-GMO Foods and Beverages in Retail
- Associations Support Safe and Accurate Food Labeling Act
- Spelling Out the Opposition in Vermont
- Retailer Responsibilities for In-Store Prepared Foods
- Strong Potential for Non-GMO in Retail Mainstream
- Natural Food Retailers Going GMO-Free
- Mainstream Going Non-GMO, Too
- Global Retail Environment for Non-GMO Products
- Labeling Animal-Based GMO Food Products
- Non-GMO Foods and Beverages in Foodservice
- Non-GMO Activity Increasing in Foodservice
- Many Independent Non-GMO Restaurants
- Chipotle Takes A Big Non-GMO Step
- McDonald's USA Rejects Innate Potato
- McDonald's UK GMO-Free
- Foodservice in European Regional Zones Ban GMO Products
- Thousands of Vegetarian Restaurants Potential Non-GMO Locations

Chapter 8: Consumer Attitudes and Concerns

Key Points

Methodology
- Favorable Demographic Indicators
- Overall Trends
- Most Consumers Favor GMO Labeling: 40% Choose Non-GMO Products
- Table 8-1 GMO Grocery Products: Attitudes and Actions, 2015 (percent of U.S. adults)
- Figure 8-1 GMO Grocery Products: Attitudes and Actions, 2015 (percent of U.S. adults)
- GMO Avoidance Rate Jumps 25% in Just Two Years
- Table 8-2 Avoidance of GMO Grocery Products, 2013 vs. 2015 (percent of U.S. adults)
- Age, Kids, Race Strongest Predictors of Non-GMO Purchasing
- Table 8-3 Demographic Indicators Favoring Agreement with Statement: “I try to buy as many foods without GMOs as possible,” 2015 (percent of U.S. adults)
- Table 8-4 Demographic Indicators Favoring Agreement with Statement: “I buy grocery products specifically labeled as non-GMO,” 2015 (percent of U.S. adults)
- Table 8-5 Relative Frequency of non-GMO Grocery Purchases, by Product Category, 2015 (U.S. adults)
- Figure 8-2 Relative Frequency of non-GMO Grocery Purchases, by Product Category, 2015 (U.S. adults)
- Table 8-6 Demographic Indicators non-GMO Grocery Purchases, by Product Category, 2015 (U.S. adults)
- Consumers of Dairy Alternative Beverages More Apt to Choose GMOFree Varieties
- Figure 8-3 Types of Dairy Milk Consumed Most Often, 2015 (percent of U.S. adults)
- Figure 8-4 Types of Dairy Milk Consumed Sometimes, 2015 (percent of U.S. adults)
- Figure 8-5 Types of Refrigerated Non-Dairy Milk Consumed Most Often, 2015 (percent of U.S. adults)
- Figure 8-6 Types of Refrigerated Non-Dairy Milk Consumed Sometimes, 2015 (percent of U.S. adults)
- Figure 8-7 Types of Shelf-Stable Non-Dairy Milk Consumed Most Often, 2015 (percent of adults)
- Figure 8-8 Types of Shelf-Stable Non-Dairy Milk Consumed Sometimes, 2015 (percent of adults)
Figure 8-9 Reasons for Choosing Non-Dairy Milks, 2015 (percent of U.S. adults)

Food Safety, Nutrition, and Clean Labels
Concern About Food Safety on the Rise
Parents, Hispanics Exceptionally Concerned About Safety of GMO Foods

Table 8-7 Demographic Indicators Favoring Agreement with Statement: “GMO food products are not safe to eat,” 2015 (percent of U.S. adults)
Table 8-8 Level of Agreement with Statement: “I Worry About the Use of GMOs in Meat Feed,” 2014 (percent of U.S. adults)
Table 8-9 Concerns About Source and Safety of Meat and Poultry: Hispanic vs. All Food Shoppers, 2014 (percent and index of U.S. adults)

Table 8-10 Demographic Indicators Favoring Agreement with Statement: “Non-GMO foods are more nutritious,” 2015 (percent of U.S. adults)

GMO Freedom a Reason for Buying Locally
Figure 8-10 Primary Reasons for Purchasing Locally Grown or Locally Produced Foods, 2014 (percent of U.S. adults)
Asian Consumers Exceptionally Likely to Buy Organic, Thereby Avoiding GMOs

Table 8-11 Demographic Indicators Favoring Agreement with Statement: “Products labeled as natural do not contain GMO ingredients,” 2015 (percent of U.S. adults)
Table 8-12 Demographic Indicators Favoring Agreement with Statement: “Products labeled as organic do not contain GMO ingredients,” 2015 (percent of U.S. adults)
Table 8-13 Demographic Indicators Favoring Agreement with Statement: “I buy groceries labeled as organic in part to avoid GMO products,” 2015 (percent of U.S. adults)
Table 8-14 Demographic Indicators Favoring Agreement with Statement: “When shopping for food, I especially look for organic or natural foods,” 2015 (percent and index of U.S. households)
Table 8-15 Demographic Indicators Favoring Use of Organic Foods, 2015 (percent and index of U.S. households)

Table 8-16 Demographic Indicators Favoring Use of Organic Fresh Produce, Eggs, and Milk, 2015 (index of U.S. households)
Table 8-17 Demographic Indicators Favoring Use of Organic Foods, by Types Used Most Often, 2015 (index of U.S. households)
Table 8-18 Demographic Indicators Favoring Agreement with Statement: “GMO crops are not safe for the environment,” 2015 (percent of U.S. adults)
65% of Consumers Want GMO Labeling; Only 45% Read Labels
Table 8-19 Demographic Indicators Favoring Agreement with Statement: “Grocery products that contain GM or GMO ingredients should say so on the label,” 2015 (percent of U.S. adults)
Table 8-20 Demographic Indicators Favoring Agreement with Statement: “I usually read the information on product labels,” 2015 (percent and index of U.S. households)
Table 8-21 Demographic Indicators Favoring Agreement with Statement: “I like to know as much as possible about ingredients before I buy food products,” 2015 (percent and index of U.S. households)
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