
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 Packaged Facts 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. Packaged Facts has analyzed 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 Packaged Facts 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
Environmental Protection Agency
U.S. Department of Agriculture
International Organizations
Food and Agriculture Organization of the United Nations
World Health Organization
European Commission
Food and Ingredient Manufacturers
GMO Food and Ingredient Companies
AquaBounty Technologies
Archer Daniels Midland
Bayer CropScience
ConAgra
Dow Agrosciences
DuPont
Monsanto
PepsiCo
Syngenta
Food Companies
Giant Corporations Work Against GMO Labeling
Organic Companies Oppose GMOs
Amy's Kitchen
Clif Bar & Company
Frontier Natural Products Co-op
Lundberg Family Farms
Mercola Health Resources
Nature's Path
Organic Valley
Stonyfield Farm
Food Retailers
Whole Foods
Trader Joe's
Walmart
Pro-GMO Organizations and Associations
Biology Fortified, Inc.
Biotechnology Industry Organization
Center for Science in the Public Interest
Council for Biotechnology Information
CropLife International
Genetic Literacy Project
Grocery Manufacturers Association
The Institute of Food Science & Technology
International Service for the Acquisition of Agri-biotech Applications
Organizations and Associations Questioning GMOs
African Biodiversity Network
The Alliance For Food Sovereignty in Africa
Center for Food Safety
Committee for Independent Research and Information on Genetic Engineering
Consumers Union
Danube Soya
Illustration 3-1 Danube Soya Logo
European Consumer Union
European Network of Scientists for Social and Environmental Responsibility
European NGO Network on Genetic Engineering
Illustration 3-2 GENET Logo
Friends of the Earth
GMO Free Canada (http://mslaboradogirl.wix.com/gmo-freecanada#! home/mainPage)
Illustration 3-3 GMO Free Canada Logo
GMO Free USA
Illustration 3-4 GMO Free USA Logo
Institute for Responsible Technology
Just Label It!
Natural Products Association (www.npainfo.org
Organic Trade Association
Verband Lebensmittel ohne Gentechnik e.V.
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

Latin America
Brazil
Costa Rica
Mexico
Peru

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 Rounds

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)
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)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3346284/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Web Address: http://www.researchandmarkets.com/reports/3346284/
Office Code: SCBRD2QU

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>USD 3500</td>
<td></td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td>USD 7000</td>
<td></td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof

First Name: __________________________ Last Name: __________________________

Email Address: * __________________________

Job Title: __________________________

Organisation: __________________________

Address: __________________________

City: __________________________

Postal / Zip Code: __________________________

Country: __________________________

Phone Number: __________________________

Fax Number: __________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp