
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.

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