



The Market Value of IP

Non-GMO: a case study in demand

March, 2026

Today's Presentation

- 01 ——— Intro to the Non-GMO Project
- 02 ——— The Market Value of IP
- 03 ——— Why Verification?
- 04 ——— What's Next in Biotech



01

Who is the Non-GMO Project?



The Non-GMO Project

The Non-GMO Project is an independent nonprofit organization offering rigorous product verification. This supports transparency and integrity in IP for retail products.



The Non-GMO Project



Since 2010, we've grown to include...

240,000+

SKUs

5,000+

Brands

\$50 B

Annual Sales (US)

High Risk Crops



Alfalfa



Canola



Corn



Cotton



Papaya



Soy



Potato



Apple



Eggplant



Zucchini &
Yellow Summer
Squash



Pineapple



Sugar Beet



Animal-Derived

Coming Soon?



Tomato



Wheat



Sugar
Cane

High risk refers to our list of crops and inputs that are highly likely to be genetically modified, and are widely commercially available.

High Risk Crops



Alfalfa



Canola



Corn



Cotton



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02

The Market for Non-GMO



Shopper Demand for IP Products

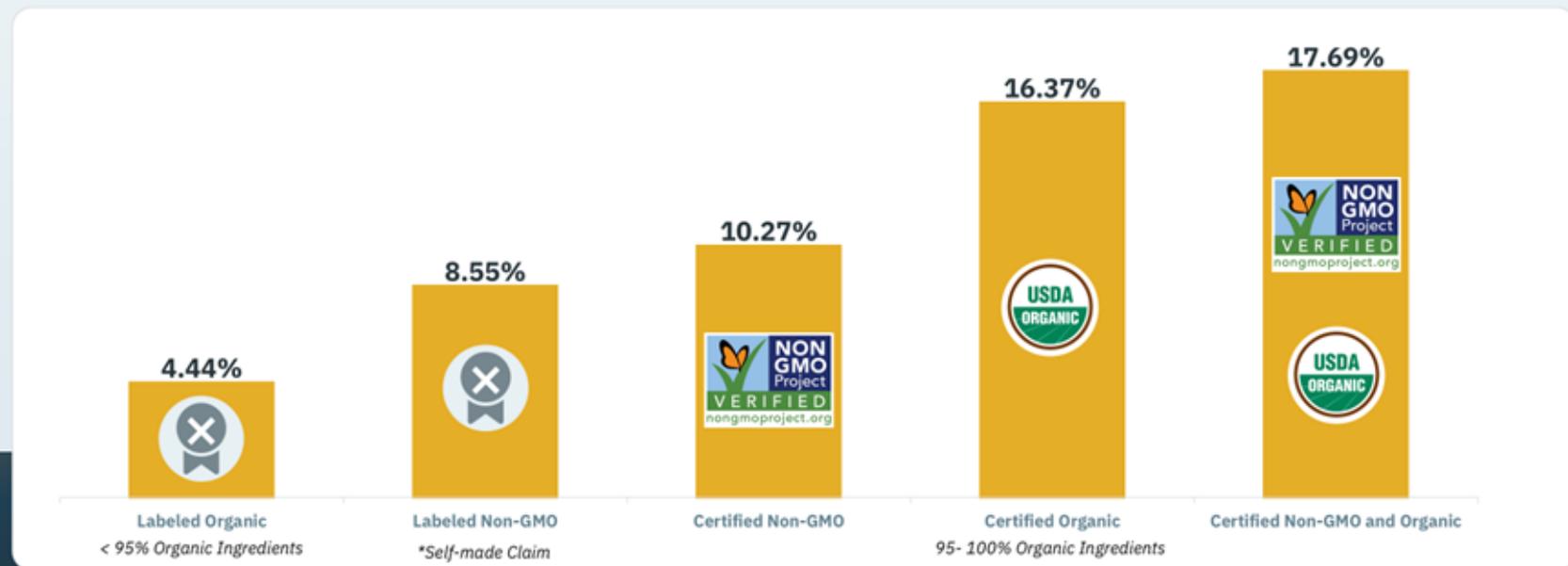


117 Million North American Shoppers



Non-GMO Project Verification Boosts Growth

In a market that's growing across the board, Non-GMO Project verification gives products an edge





Certified Organic and Certified Non-GMO 2Y Growth

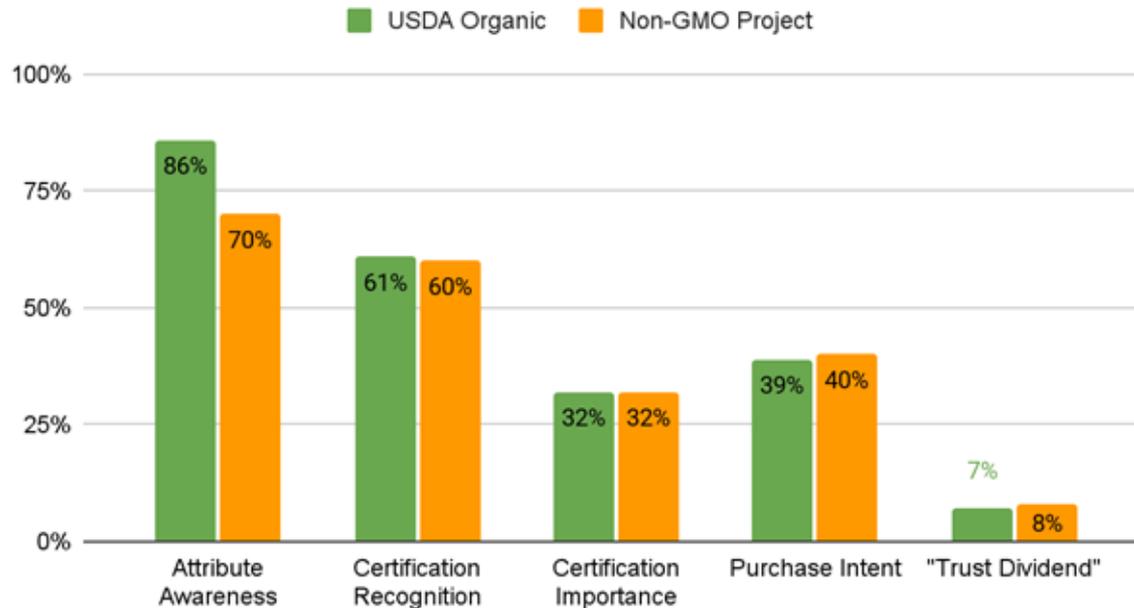
Packaged Foods Sales Volume



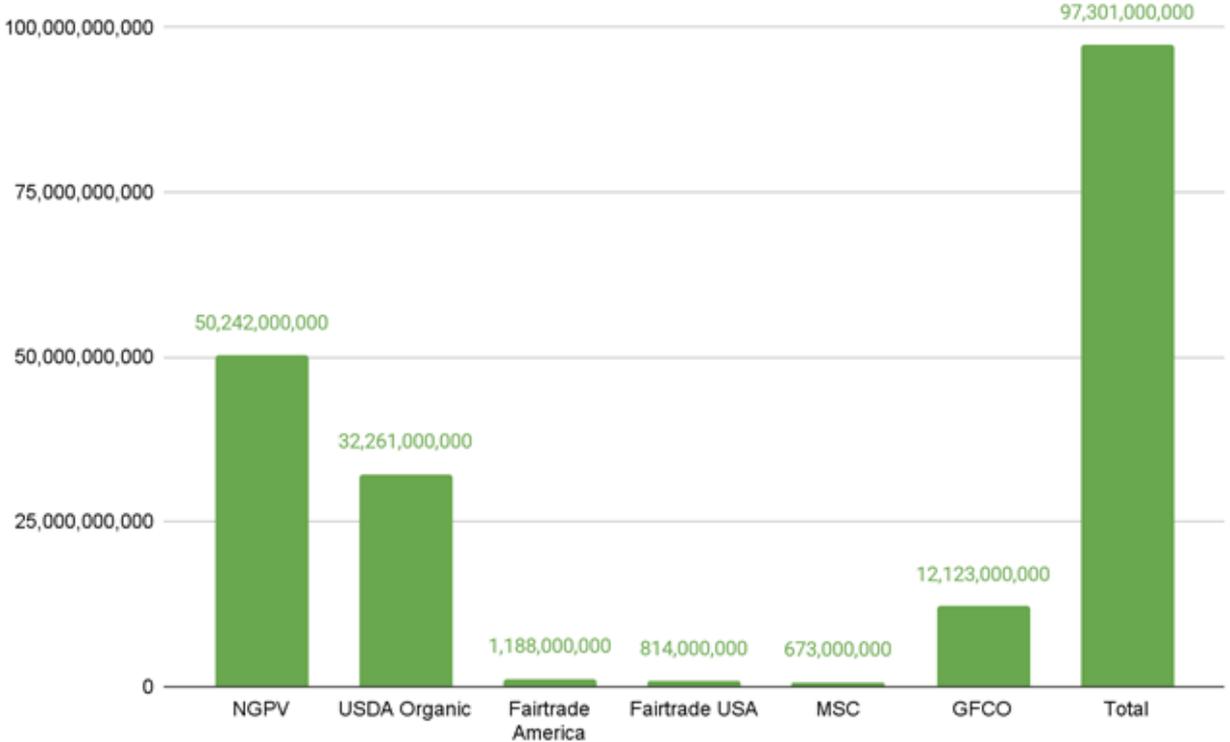
Source: 104 weeks ending 12.28.25 SPINS SNE, MUO, powered by Circana.
Categories: Grocery, Frozen, Refrigerated, Produce, VMS, Alcohol, Body Care, Pet

Shopper Demand for IP Products

Consumer Interest in IP Products



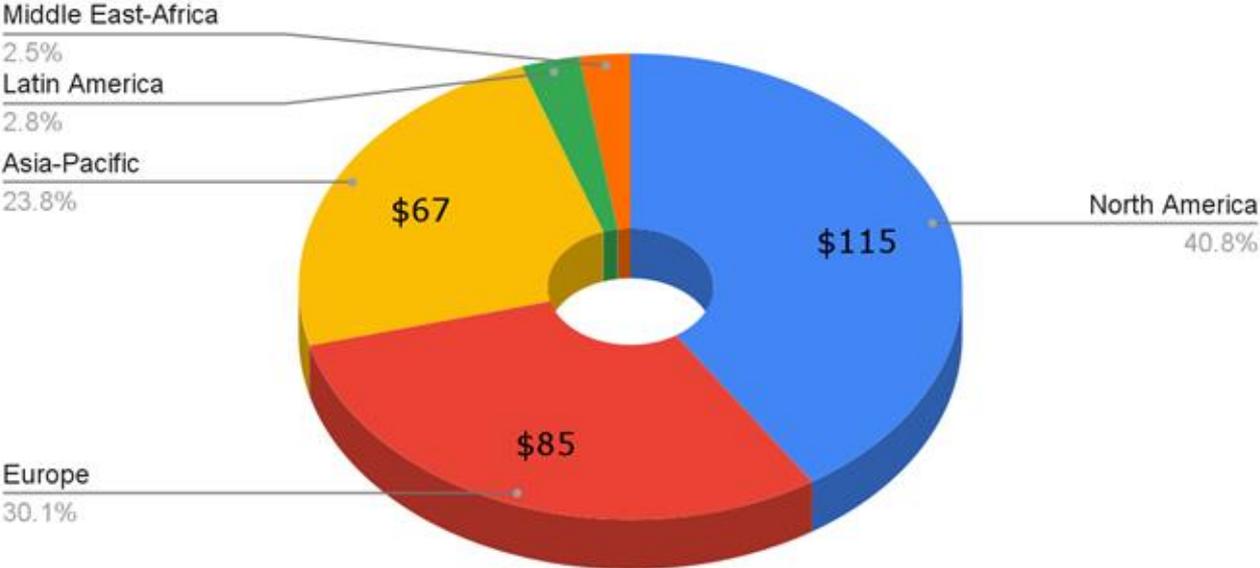
Shopper Demand for IP Products



Source: SPINS 2026

Global Demand for IP Products

\$250 Billion Global Market for Organic, Non-GMO



Sales Data

Category Landscape Filters: Pet, Convenience, MULO, Natural > TPL > All Departments > All Categories > All Subcategories

	Attribute Share	Attribute Share Pt Chg	Att Sales (M)	Att Sales % Chg	ARP	ARP % Chg
Brand Positioning						
Conventional Positioning Group	66%	-1.3	\$568,206	-0%	\$4.39	2%
Specialty & Wellness Positioning...	22%	0.5	\$186,031	4%	\$5.06	1%
Natural Positioning Group	13%	0.8	\$110,921	8%	\$5.48	2%
Label Claims & Certifications						
Labeled Gluten Free	14%	0.6	\$124,617	6%	\$4.68	2%
Labeled Non-GMO	12%	0.5	\$103,321	6%	\$4.59	3%
Certified Non-GMO Project Verifi...	6%	0.2	\$50,242	4%	\$4.30	3%
Labeled Organic	4%	0.3	\$32,261	10%	\$5.44	4%
Labeled Vegan	3%	0.3	\$29,664	10%	\$4.83	2%
Labeled No Added Hormones	3%	0.4	\$28,925	16%	\$4.91	6%
Certified B Corporation	2%	0.0	\$17,589	2%	\$5.10	4%
Certified Gluten Free GFCO	1%	0.1	\$12,123	8%	\$4.24	2%
Labeled Antibiotic Free	1%	0.2	\$11,997	16%	\$6.81	7%
Labeled Paraben Free	1%	0.0	\$10,518	6%	\$8.70	3%
Certified Whole Grains Council	1%	0.0	\$7,335	0%	\$4.46	-1%

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Labeled Non-GMO	46%	-0.2	\$51,436	8%	\$5.15	3%
Labeled Gluten Free	44%	0.4	\$48,703	9%	\$5.07	3%
Labeled Organic	26%	0.2	\$29,227	9%	\$5.42	4%
Certified Non-GMO Project Verifi...	24%	-0.1	\$26,911	8%	\$4.87	2%
Labeled Vegan	16%	-0.2	\$17,769	7%	\$5.31	4%
Labeled No Added Hormones	13%	1.1	\$14,663	18%	\$4.82	6%
Certified B Corporation	10%	-0.4	\$11,502	4%	\$5.64	5%
Labeled Antibiotic Free	7%	0.7	\$7,963	19%	\$7.05	8%
Certified Gluten Free GFCO	6%	0.1	\$7,109	9%	\$4.36	2%
Labeled Fair Trade	4%	0.0	\$4,822	8%	\$5.46	4%
Labeled Animal Welfare	3%	0.2	\$3,699	17%	\$7.47	7%
Labeled Paraben Free	3%	0.0	\$3,587	7%	\$8.88	3%
Labeled Grain Free	3%	-0.1	\$3,165	3%	\$7.47	-2%
Certified Whole Grains Council	3%	-0.1	\$2,853	3%	\$5.15	-1%

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Product Intel

IP Products (Select) Launched in the Americas since 2021



Source: Mintel GNPD, 2026

Case Study: Tofu

Category Landscape Filters: Pet, Convenience, MULO, Natural > TPL > All Departments > Refrigerated Tofu > All Subca

	Attribute Share	Attribute Share Pt Chg	Att Sales (M)	Att Sales % Chg	ARP	ARP % Chg
Brand Positioning						
Natural Positioning Group	100%	0.1	\$142	-0%	\$3.33	1%
Specialty & Wellness Positioning...	0%	-0.1	\$1	-18%	\$3.02	36%
Conventional Positioning Group	0%	0.0	\$0	-16%	\$3.61	-27%
Label Claims & Certifications						
Labeled Non-GMO	97%	0.5	\$139	0%	\$3.30	0%
Certified Non-GMO Project Verifi...	80%	0.9	\$115	1%	\$3.34	0%
Labeled Organic	65%	-1.6	\$94	-3%	\$3.67	1%
Certified Plant Based Foods Asso...	62%	-0.4	\$88	-1%	\$3.28	-1%
Labeled Gluten Free	57%	0.8	\$82	1%	\$3.31	0%
Labeled Vegan	47%	-0.5	\$67	-2%	\$3.72	1%
Labeled Sprouted	22%	-0.2	\$32	-2%	\$3.84	0%
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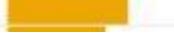
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03

Why Verification Matters



Structural Demand

Outside of stable and growing **market** demand, IP verification can help meet long term structural demand.



Regulatory

Risk
Management

Retailer
Purchasing
Policy

Corporate
ESG
Commitments

Natural Retailers

The natural market includes retailers like Whole Foods Market, Sprouts, Natural Grocers and NCG.

Many natural retailers prefer or require attributes like Non-GMO Project verification on the brands they distribute.



Corporate Goals

Global Food Manufacturers Are Committing to IP Supply — **Verified Supply Is the Bottleneck.** Large corporate commitments can raise the tide for all boats.



Nestle

Kraft
Heinz

Unilever

Self-made Claims VS Verification



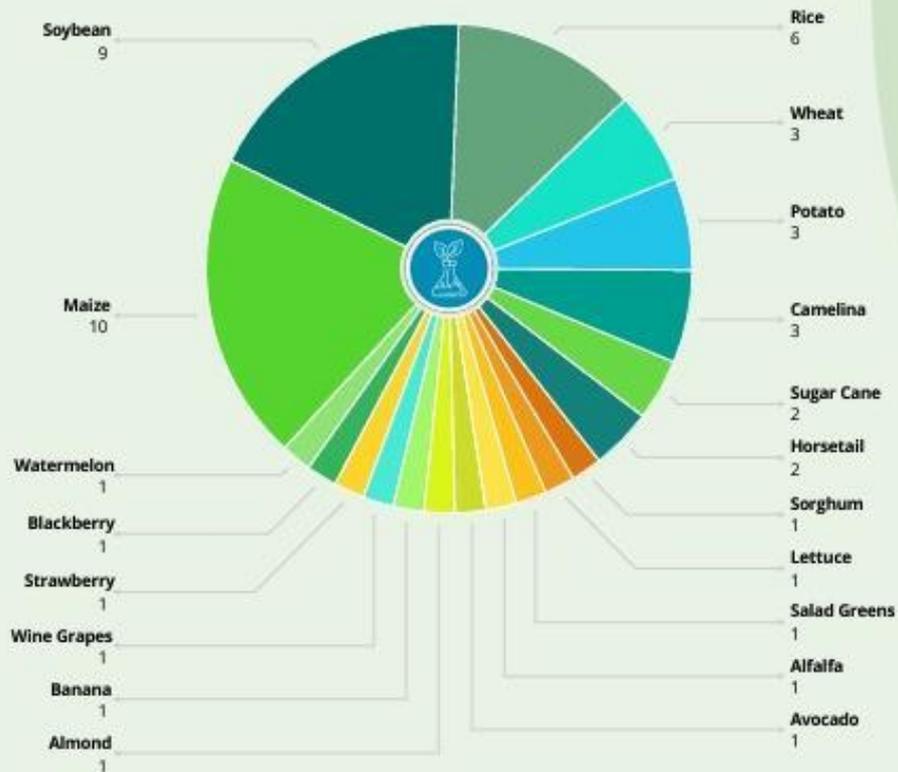
04

The State of GMO Development



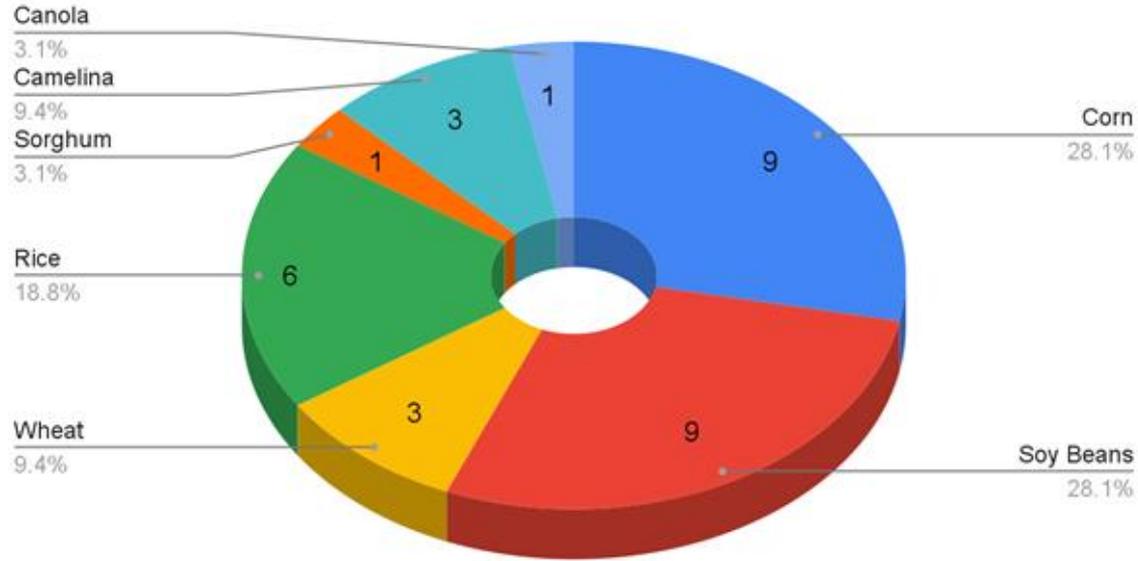
GRAPHIC 1 New GMOs in Development

- Maize
- Soybean
- Rice
- Wheat
- Potato
- Camelina
- Sugar Cane
- Horsetail
- Sorghum
- Lettuce
- Almond
- Banana
- Wine Grapes
- Strawberry
- Blackberry
- Watermelon
- Avocado
- Alfalfa
- Salad Greens



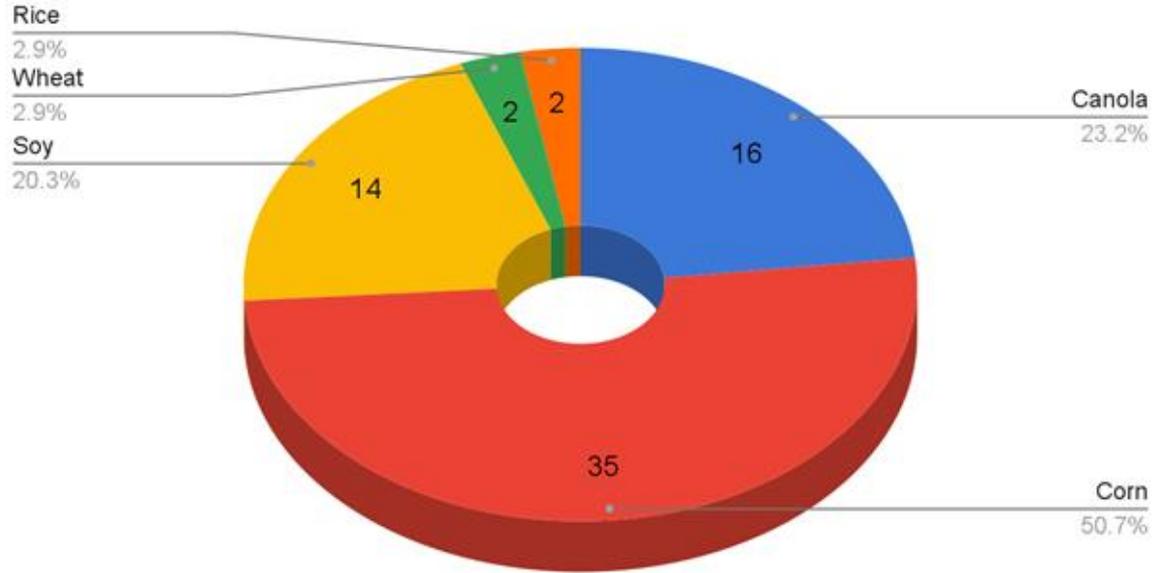
New GE Grains in Cultivation

(CRISPR, TALEN, etc.)



Old GE Grains in Cultivation

(Transgenic)



Myth VS Reality

“Feed the World” ... Food Waste

Climate Resilience ... Ht/Bt

Maximizing ... Optimizing

Supply ... Demand

06

Questions & Answers





Thanks!

1. Email: hans@nongmoproject.org
1. Visit Us www.nongmoproject.org/apply-for-verification/
1. Schedule a meeting



Sam