



Verified Success

The Non-GMO Project's Impact
on Next Generation Retail

NOVEMBER 2024



Agenda

- Impact & demand for the Non-GMO Project
- Broader industry trends around verification
- Where Non-GMO Project Verification Accelerates Growth
- Takeaways & Looking forward to 2025
- Q&A

SPEAKERS



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Senior Channel Growth Manager,
SPINS



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Director of Mission and Messaging
The Non-GMO Project



Impact of the Non-GMO Project

Founded in 2007, the Non-GMO Project is the **only third-party verification in North America for GMO avoidance**, and **the most widely recognized food certification after USDA Organic**.

64,000+

unique-formula Verified products,
or over **120K SKUs**.

\$47 billion

Estimated annual Butterfly sales
in the US.

10%

of all groceries carry the Butterfly.
In natural grocery space, this
number is significantly larger.

Demand for the Butterfly: **All Shoppers**

99

grocery categories carry the Butterfly including personal care, pets, and mercantile

37%

of all North American consumers recognize the Butterfly; parity with recognition of USDA Organic and influence to purchase*

66%

who recognize the mark prefer to buy Verified products.*

71%

of Gen Z say they are influenced to buy a verified product – higher than any other generation.*

Demand for the Butterfly: **Natural Shoppers**

Natural shoppers represent 117 million adults in the US and Canada.

96

believe the quality of food is a critical factor in health and wellness.

90%

agree, "I want my food to be natural and GMOs are unnatural."

85%

are more likely to buy a Non-GMO Project Verified product.

86%

are willing to pay a premium for a Non-GMO Project Verified product.



Broader Industry Trends Around Verification

The landscape today for the Non-GMO Project.

The state of global deregulation

US Executive Order on Biotechnology.
Deregulation efforts in China, Canada, EU, Mexico, New Zealand and Australia.

Growth of biotech

There is now a lower barrier to entry into biotechnology due to the use of CRISPR, Talen, precision fermentation, etc. Examples: synthetic milk, new produce in market, biotech sweet corn, etc.

NBFDS

Since 2019, the weak National Bioengineered Food Disclosure Standard (“BE” disclosure) has increased the need for Non-GMO Project verification. Our definition of non-GMO is much cleaner, more thorough, and more understood than the definition of “bioengineered.”

More important than ever

New GMOs and synthetic ingredients are entering the market unlabeled. Third-party verification helps ensure these new GMOs aren’t sneaking into products.

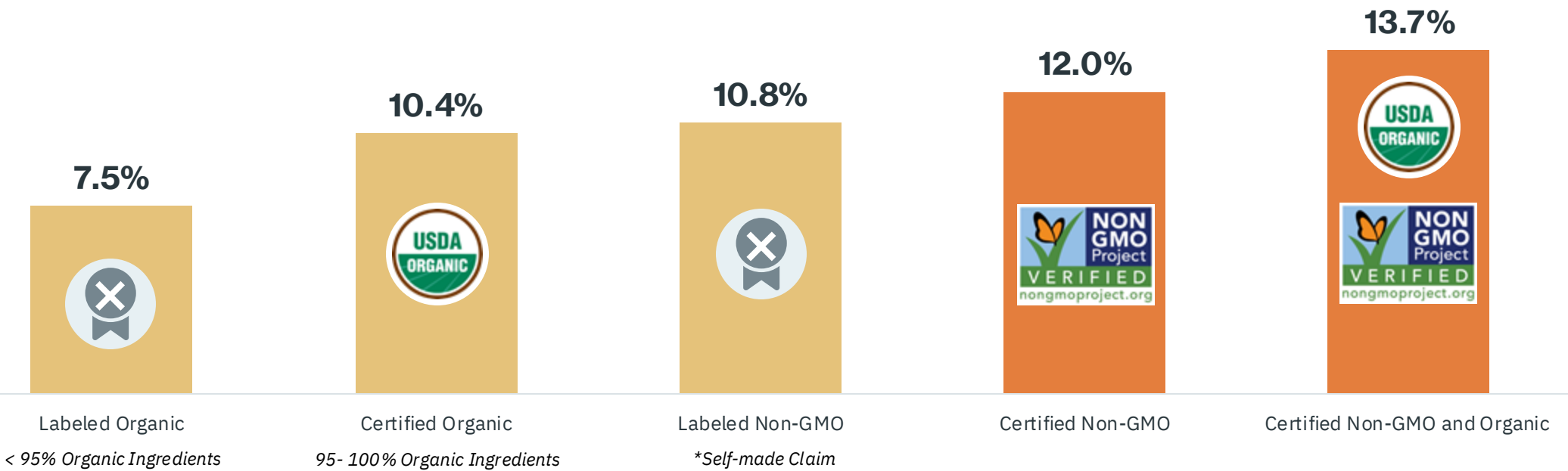




Non-GMO Project Verification Boosts Growth*

Certified products outstripped growth compared to products with self-made claims

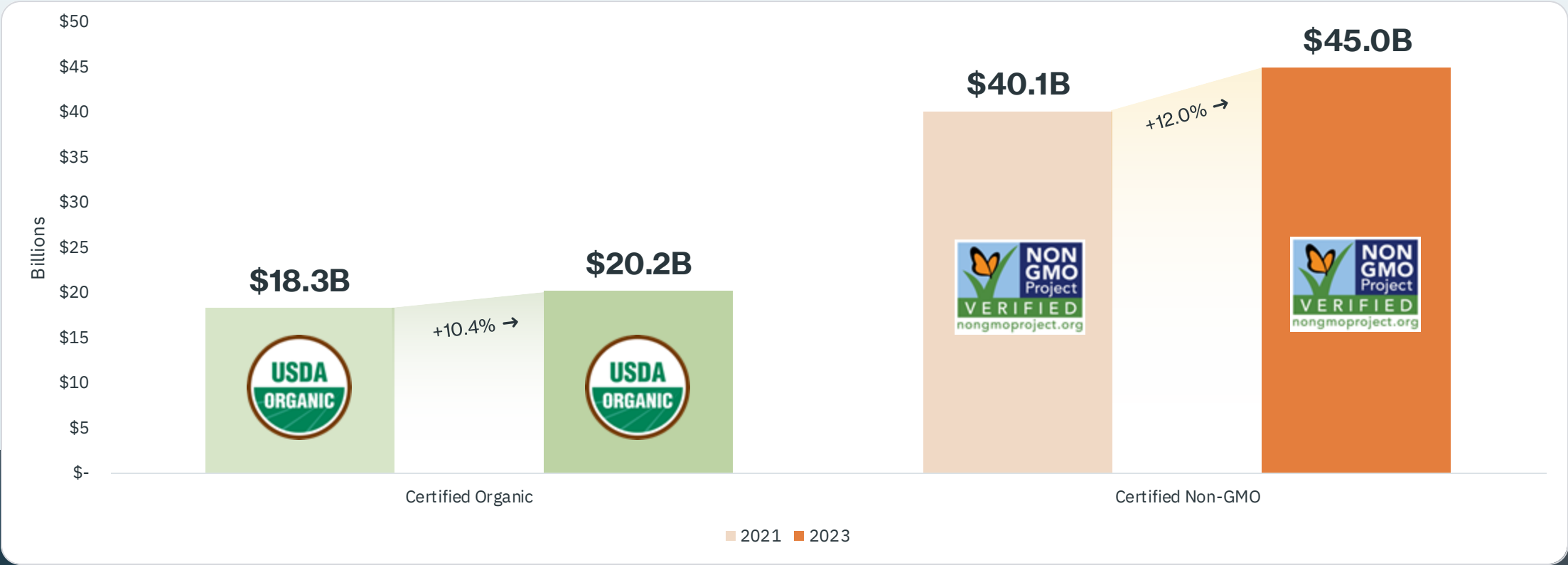
In a market that’s growing across the board, Non-GMO Project verification gives products an edge





Certified Organic and Certified Non-GMO 2Y Growth*

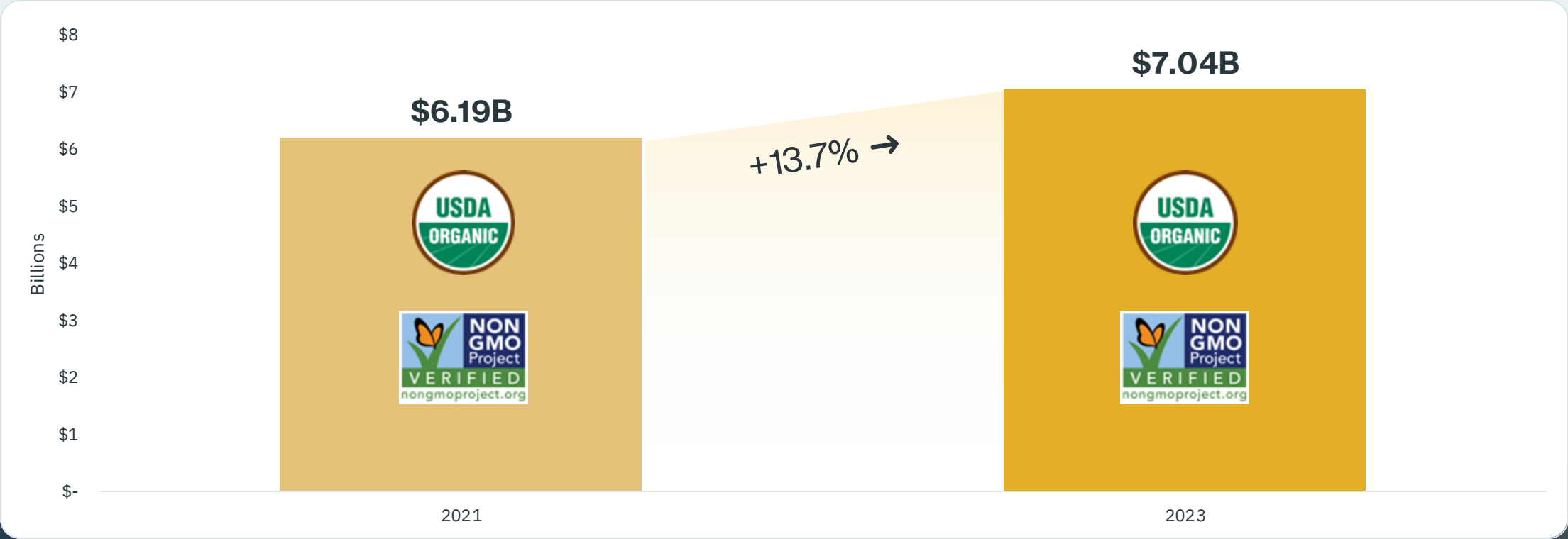
Packaged Foods Sales Volume





Combined **Certified Organic** and **Non-GMO** 2Y Growth

Combined Sales Volume



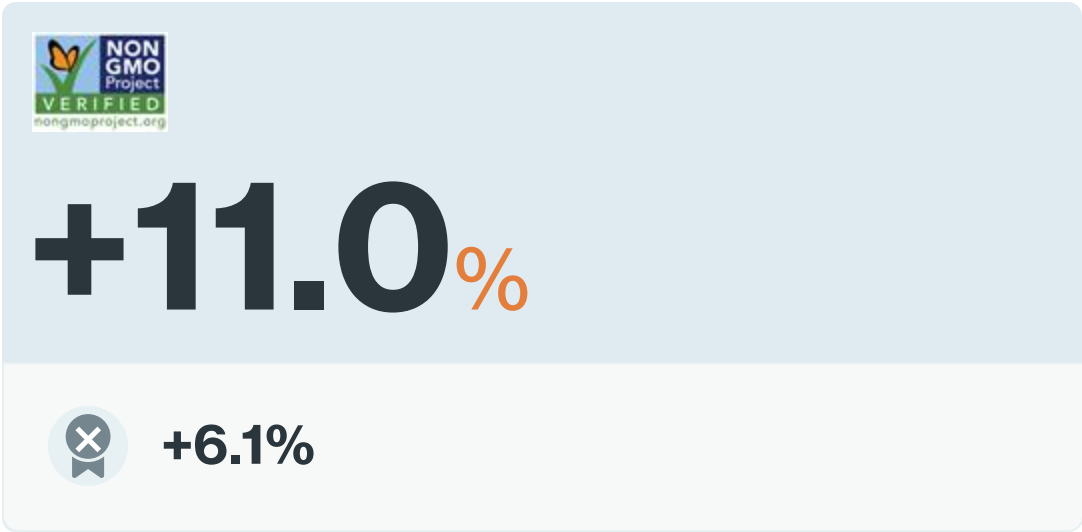
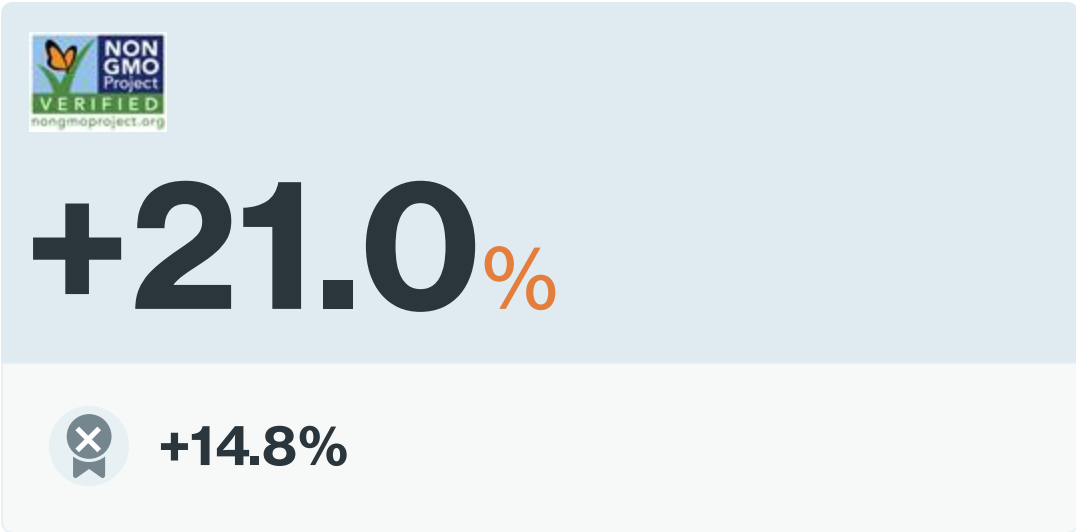


Top Growth Departments*

Where Non-GMO Project verification drove the greatest differentiation in terms of \$ sales vs 2 YAGO.

VITAMINS & SUPPLEMENTS

PACKAGED GOODS



Non-GMO Project Verified



Self-Made Label Claims



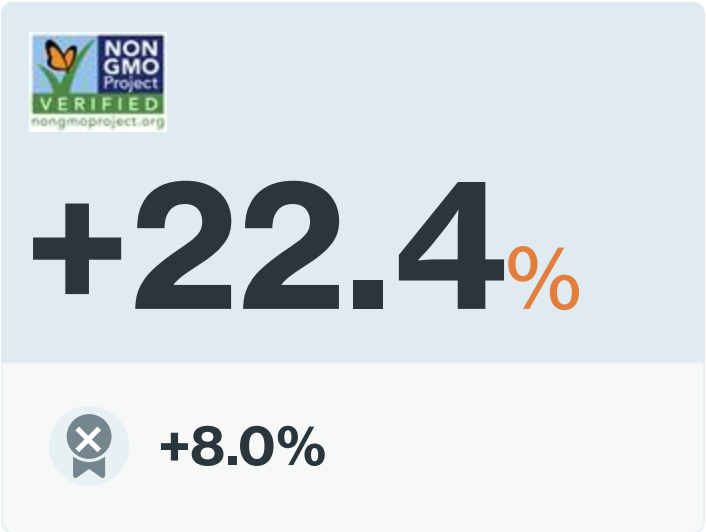
Top Growth Categories*

Where Non-GMO Project verification drove the greatest differentiation vs self-made label claims (\$ Sales vs 2 YAGO)

WELLNESS BARS & GELS

SHELF STABLE COLD CEREALS

SHELF STABLE SALSA & DIPS



Non-GMO Project Verified



Self-Made Label Claims



Retailers: Self-Made Label Claims Aren't Enough

Both retailers and shoppers look for third-party certification

Retailers and shoppers rely on third-party certification because of:

1. Transparent certification criteria, enabling unified standard
2. Recognition of a brand's investment and commitment to a cause
3. Clear visual markers that a product is aligned with shopper lifestyles to streamline purchase decisions



Natural Grocer, PCC Community Markets, and Mom's Organic Market—all leaders in the natural space—have built their reputations on strong ingredient requirements, **with a focus on certifications.**



New Hope.
NETWORK.



What We've Covered Today



THE BUTTERFLY CONTINUES TO DRIVE HIGHER GROWTH

Non-GMO Project sales grew more than self-made claims



STRONGER TOGETHER WITH ORGANIC

Non-GMO Project + USDA Organic
= Gold Standard



THE BUTTERFLY IS TRENDING IN “HEALTHY CONVENIENT”

Ready to eat snacks, ready to cook produce



Looking Forward to 2025



THE TRUST DIVIDEND & THE HEALTH HALO

The generic value of certifications



YOUNGER & GREENER

Natural shoppers and down-aging and expanding



INTEGRITY IN FOOD SYSTEMS

Check out the Food Integrity Collective



Q&A

Get Non-GMO Project Verified at
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For more information
contact us at growth@spins.com





Thank you!

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