

THE LATEST INGREDION IDEA LABS™ i2s BRIEF

ANSWER THE DEMAND FOR NON-GMO

New research helps you better understand consumer concerns about genetically modified organisms, so you can offer the information, documentation and choices consumers can feel good about.

Ingredion conducted primary research with consumers through Natural Marketing Institute (NMI) in May 2015. These findings, coupled with quantitative NMI research reported in March, were used to bring you this Ingredion Idea Labs™ i2s brief.

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WHAT DO CONSUMERS KNOW, THINK AND FEEL ABOUT GMOS?

Few topics in the world of food cause consumers as much confusion as GMOs. What do consumers truly understand? How do non-GMO options affect purchase behavior, brand trust and affinity? How can you deliver the transparency consumers increasingly demand, backed by insights about what matters to them? See inside for answers.

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KNOWLEDGE: **LOW**. CONFUSION: **HIGH**.

Consumers who participated in our research identified themselves as being in one of two groups:¹

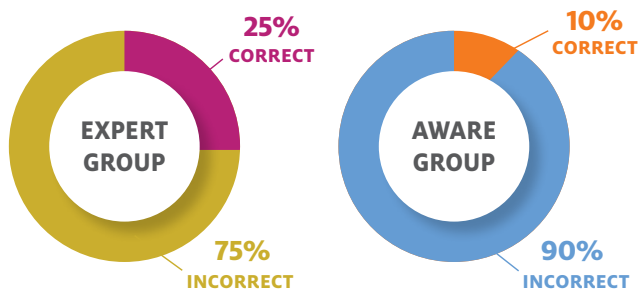
EXPERTS: those who have a general understanding of what GMO means



AWARES: those who express considerable confusion when trying to define what GMO means



Even self-defined **EXPERTS** answered most questions incorrectly about GMOs¹



Consumers in both groups have very little correct knowledge of GMOs in foods and beverages and desire more education. NMI notes the difference in the groups can be characterized as those who think they know (**EXPERTS**) versus those who know they don't know (**AWARES**).

What one **EXPERT** said:

"One negative of GMO food: the unknown of how they are creating it, how they are making the product. What is going to happen to you in 50 years? There are unknown side effects."¹

What one **AWARE** said:

"It affects kids more because they are developing, so I am more concerned about GMOs for my kids than myself."¹

Lack of understanding fuels concerns¹

Here are comments about GMOs made by consumers in both groups:



Some see **benefits¹**

EXPERTS acknowledge that good things can come from GMOs.

look better
resist pesticides
grow faster
increase food production
grow bigger
larger

WANTED: INFORMATION, EDUCATION AND NON-GMO PRODUCTS

All participants indicated they wanted more **information**—especially from third-party, non-profit organizations. They expressed some skepticism about information from food manufacturers and the U.S. Food and Drug Administration.¹



REGARDLESS OF WHAT EXPERTS OR AWARES THINK ABOUT GMOS, THEY WOULD LIKE TO SEE MORE GMO LABELING.¹

How interest in non-GMOs varies by food category

Both EXPERTS and AWARES placed a higher importance on purchasing non-GMO foods and beverages that are:³

- consumed more *frequently* or on a regular basis
- *good for you* versus those that are viewed as indulgences (e.g., chips)
- perceived as *close to their natural state* versus those that are processed



“I know you can’t grow a cookie in the field, so I don’t care whether it is GMO or not.”¹ GMO EXPERT, CHICAGO

Participants in both groups described the GMO-free brands they want as:¹

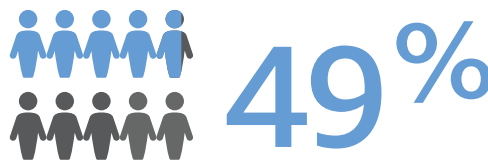


IN OTHER NMI RESEARCH, **58% OF CONSUMERS SAY IT’S IMPORTANT FOR STORES TO CARRY PRODUCTS THAT DO NOT INCLUDE GENETICALLY MODIFIED INGREDIENTS.²**

Consumers believe GMOs affect them

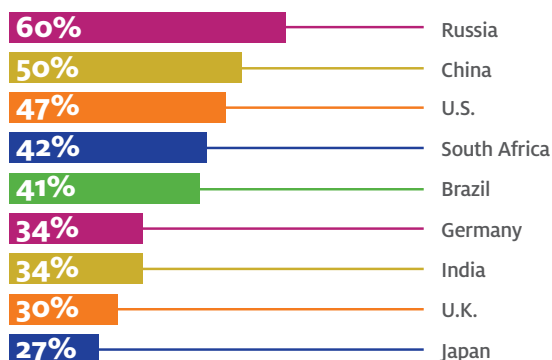


62% of U.S. consumers say they believe GMOs affect their personal health.²



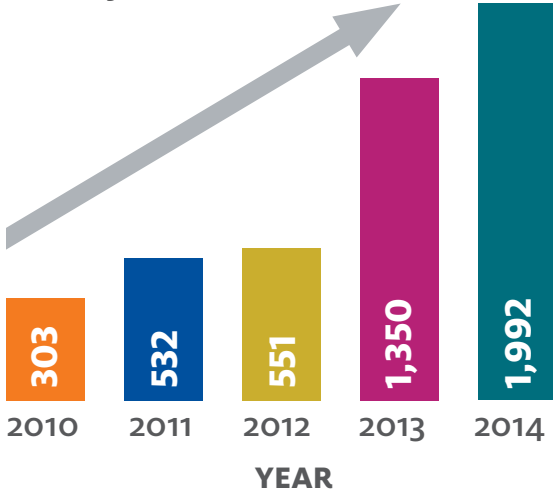
49% of U.S. consumers say they believe GMOs affect the environment.²

Consumer concern about GMOs is global²



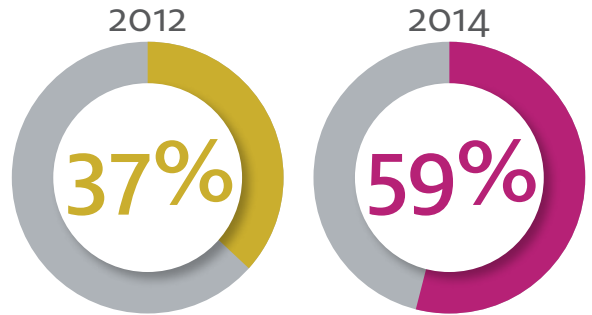
A GROWING U.S. MARKET

GMO-free product launches in the U.S. have skyrocketed³



Usage of non-GMO-labeled foods is up

U.S. consumers have increased their consumption of foods labeled as non-GMO by 22 percentage points.²



Snacks lead the categories of foods with “GMO-free” claims

Total U.S. launches from 2000 to 2014 for foods and beverages with “GMO-free” claims across categories:³



At the end of the day, many consumers just want more transparency from food manufacturers about what’s in their food. **Offering options that are non-GMO creates opportunities for brands to acquire additional trust and loyalty among these consumers.**



SOURCES

¹ Natural Marketing Institute (NMI), June 2015

² Natural Marketing Institute (NMI), March 2015

³ Mintel GNPD

INGREDION'S NON-GMO TRACK RECORD AND BROAD PORTFOLIO OF INGREDIENTS

As consumer demand for GMO-free products continues to grow, you can respond with products made from non-GMO ingredients you and your consumers can trust—from Ingredion. We offer the broadest portfolio of non-GMO ingredients available—from starches and flours to sweeteners and nutrition ingredients. Whether they're derived from maize, pulses, potato or stevia, all of these ingredients meet appropriate non-GMO standards and applicable legislative requirements of the countries in which we operate.

Starches derived from traceable, identity-preserved maize. Since 2004, Ingredion's TRUETRACE® program has protected non-GMO purity via global, third-party-audited best practices for segregation and documentation of non-GMO maize. Our procedures for growers are strictly enforced and audited according to established protocols.

- **Our TRUETRACE® program** meets or exceeds regulations for non-GMO identity preservation and traceability in major markets worldwide.
- **Ingredion has a manufacturing site devoted entirely to non-GMO ingredients**, including the processing of non-GMO corn, and does not accept or handle any genetically modified corn.
- **More than 15 NOVATION® functional clean label starches**—and more than 45 Ingredion solutions overall—have been verified by The Non-GMO Project, a non-profit organization dedicated to independent verification of non-GMO status.



Build trust with us
ingredion.us/nongmo | 1-866-961-6285

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Starches from non-GMO tapioca, potato, rice and sago. These crops are not grown commercially as genetically modified plants; the ingredients derived from them are protected from contamination for use in non-GMO products. Crops are grown in Europe, Thailand and Brazil.

Nutritive and non-nutritive sweeteners through our global network. Ingredion offers an extensive portfolio of sweeteners including those made from corn and tapioca, as well as our ENLITEN® stevia sweetener from Brazil. You can also choose from glucose, dextrose and maltodextrin from our Ingredion network in North America and Thailand.

Flours and nutrition ingredients. Ingredion's HOMECRAFT® functional flours are manufactured in non-GMO facilities in the U.S. Our non-GMO, gluten-free flour offerings include optimized systems, rice and corn variations, as well as our new line of tapioca flours and pulse-based flours. Look to our growing portfolio of nutrition ingredients such as fibers and VITESSENCE™ Pulse proteins, plus innovative ingredient solutions including Q-NATURALE® high-efficiency emulsifier from Chile, hydrocolloids and more.

Get the proof you and your consumers demand. Only Ingredion provides a strong heritage of consistent non-GMO ingredient quality, made possible by industry-leading programs, processes and partner relationships around the world.


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