

Non-GMO Soybean Production

Volume Estimates

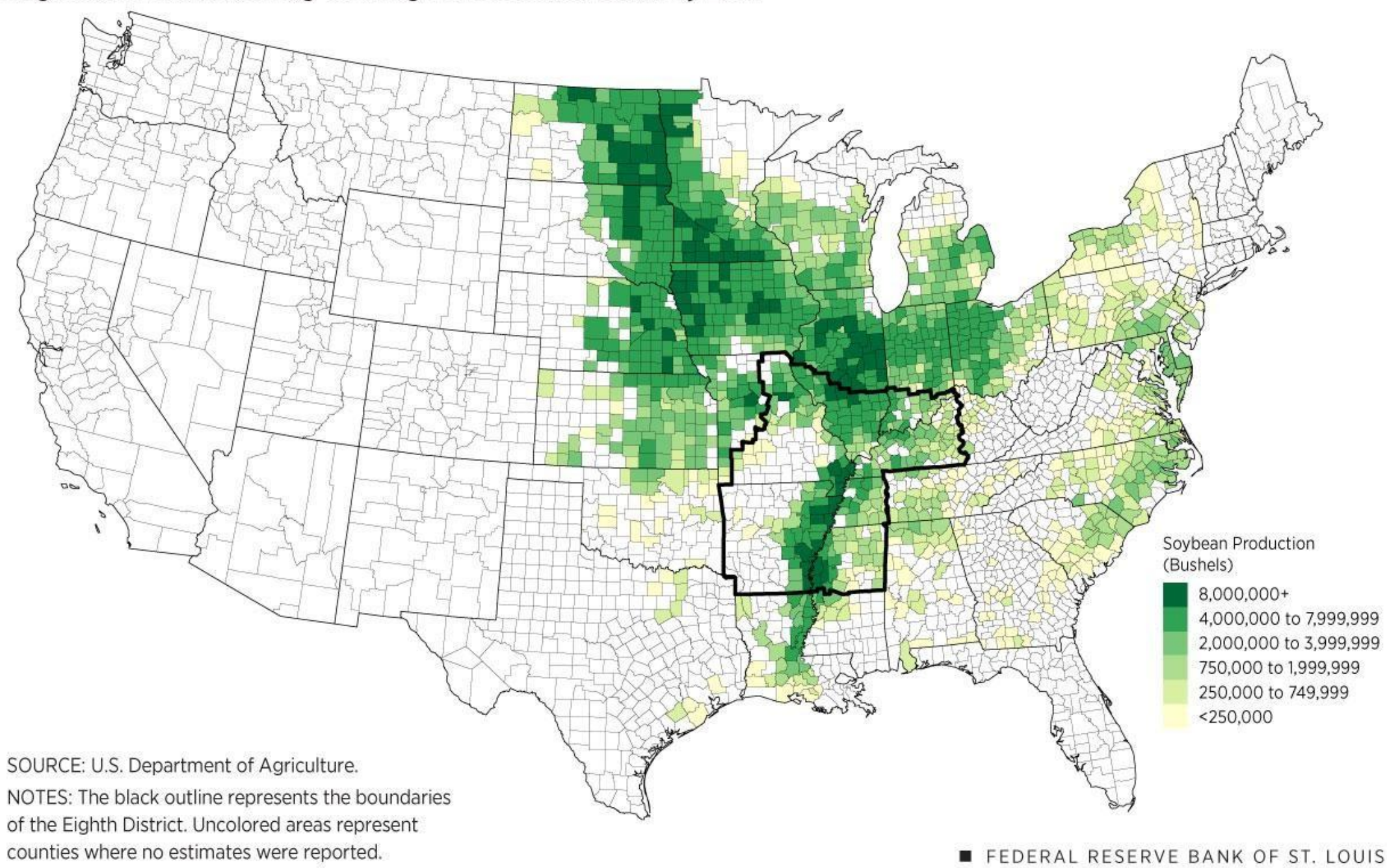
July 2025



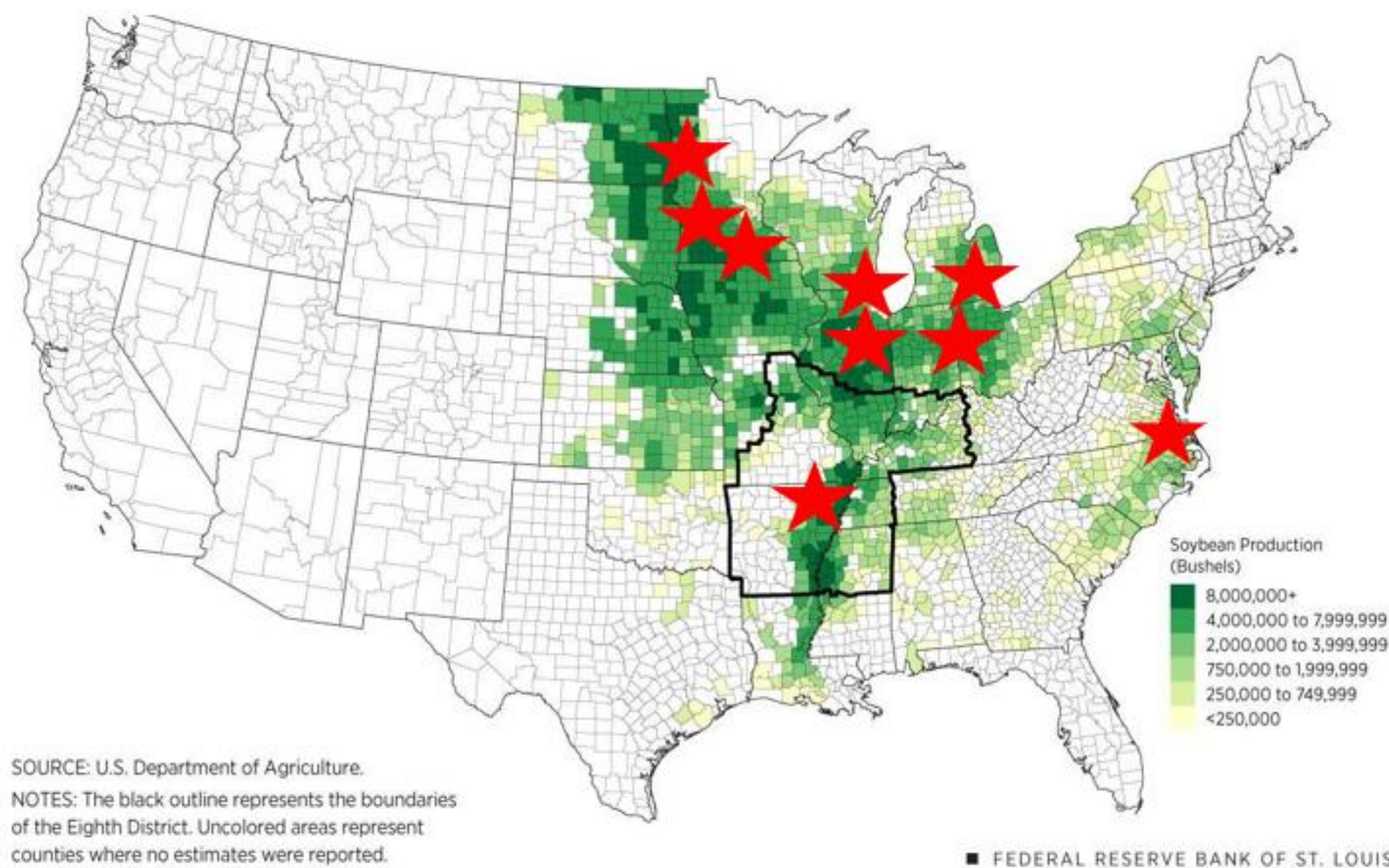
U.S. Soy Production

U.S. Soybean Production

Soybean Production by County for Selected States, 2017

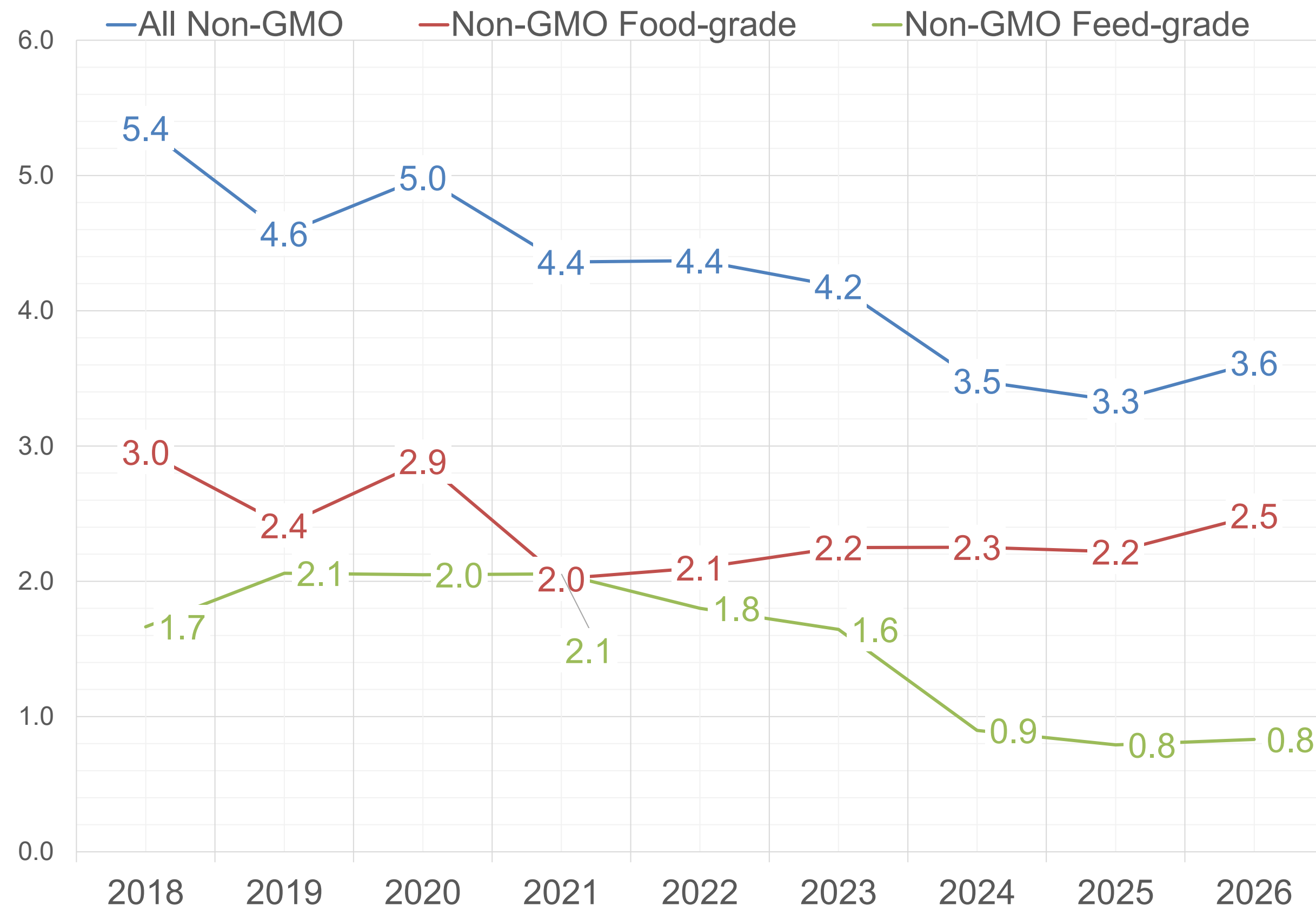


U.S. Non GMO Soy Food Production



Non GMO Acreage Estimates

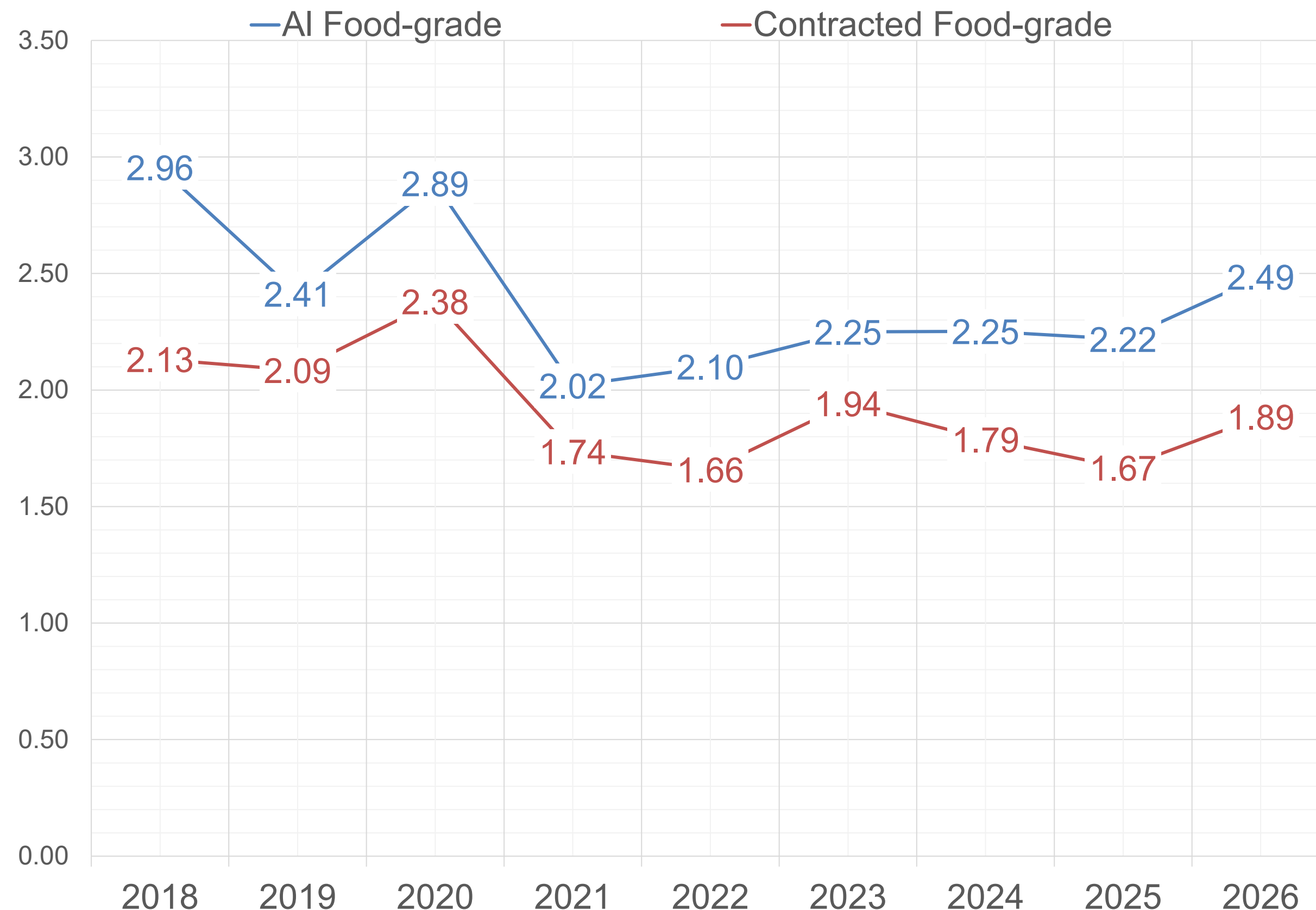
U.S. Non-GMO Soybean Acres (Millions)



- Since 2020, non-GMO acres have steadily declined, driven primarily by fewer non-GMO feed-grade acres.
- Non-GMO soybean acres in the U.S. declined by about 4% over the past year, and non-GMO food-grade acres declined by about 1%.
 - For 2025, growers planted about 2.2 million acres of non-GMO food-grade soybeans.
 - This figure is expected to increase next year. A net of 10% of growers report they will increase their non-GMO food-grade acres. This figure does not account for new growers in this market.
- In contrast, non-GMO feed-grade soybean acres have declined precipitously. Estimates show that in 2024, feed grade acres will be 900 thousand, roughly half of what it was in 2023. One reason growers may plant more food-grade rather than feed-grade soybeans is the higher premium for food-grade soybeans is a more appealing option, especially given soybean prices.

Contractual U.S. Non GMO Soy Food Soybean Acre Estimates

Soy Food Non-GMO Soybean Acres (Millions)



- Since 2021, non-GMO Soy Food acres have been close to 2 million and contracted non-GMO Soy Food acres have hovered between 1.5 million acres and 2.0 million acres.
- In 2025, approximately 1.7 million non-GMO Soy Foods were produced under contract, down about 7% from 2024.
- However, growers expect to contract for 13% more non-GMO Soy Food acres in 2026 or 1.9 million acres.

Non GMO Soy Food End Purposes

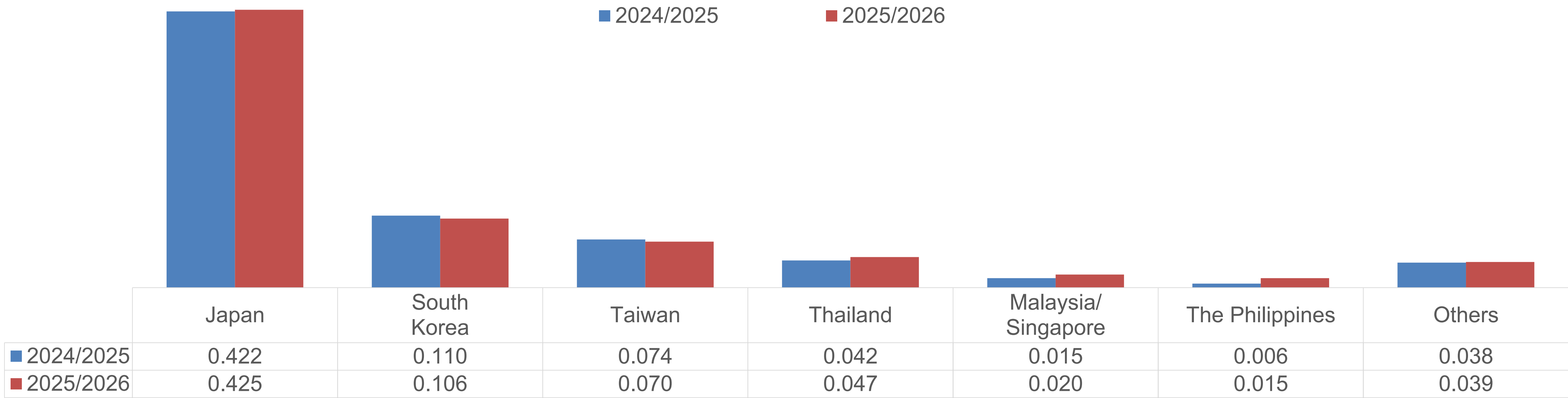
	2024	2025	2026
Tofu	42%	41%	42%
Soymilk	21%	21%	18%
Natto	14%	14%	14%
Miso	9%	9%	12%
Soy sauce	6%	6%	5%
General use bean	5%	5%	5%
Sprouts	3%	3%	3%
Edame	0%	0%	1%

Base=19

- Tofu continues to be the main use for U.S.-produced food-grade soybeans.
- Soymilk is the second highest mentioned end-purpose.
- There is no indication that the end purpose of U.S.-produced food-grade soybeans is likely to shift in the next year.

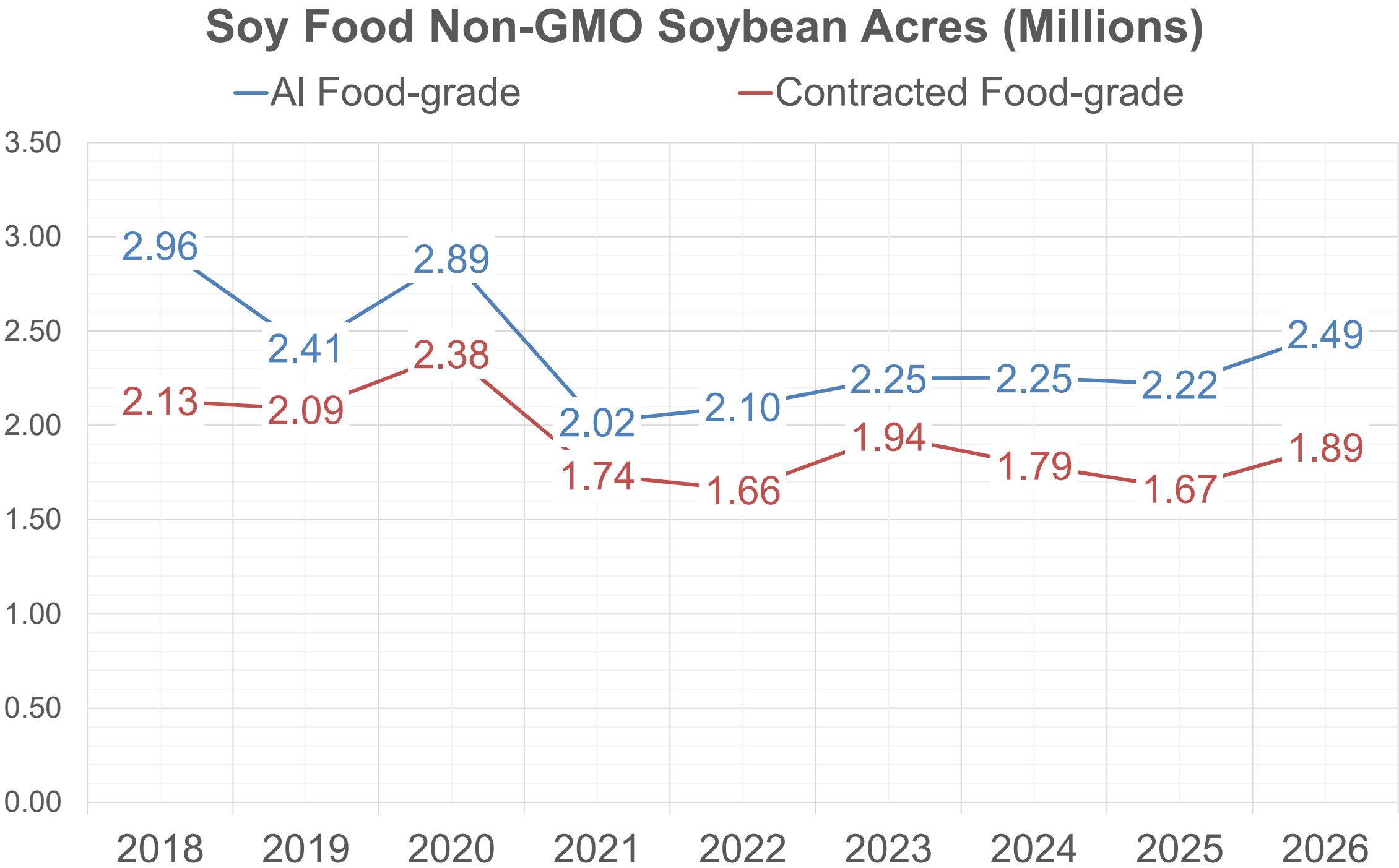
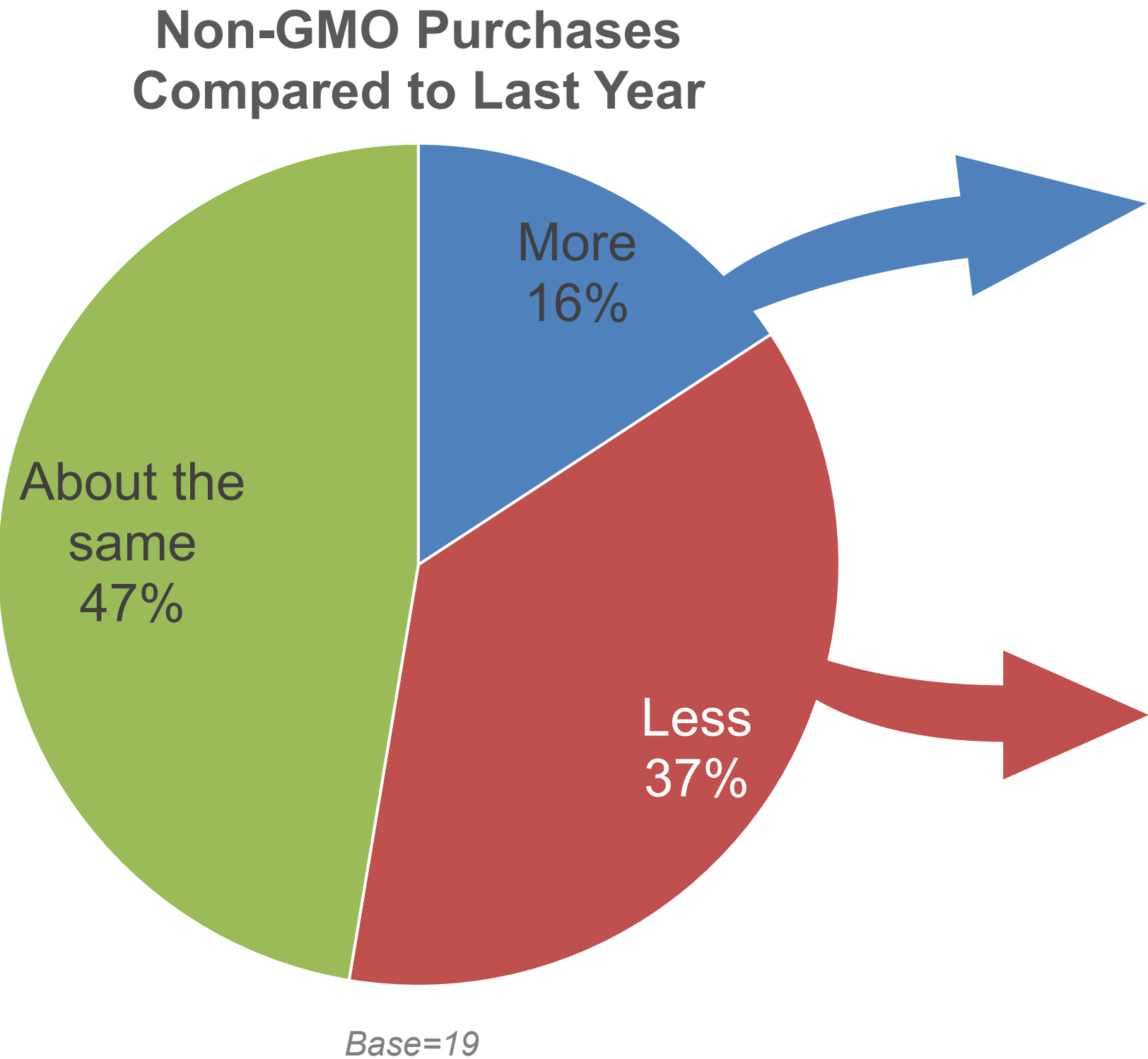
Reported Destination Markets for Soy Food Exports

Non-GMO Soy Food Volume Exports (MMT)



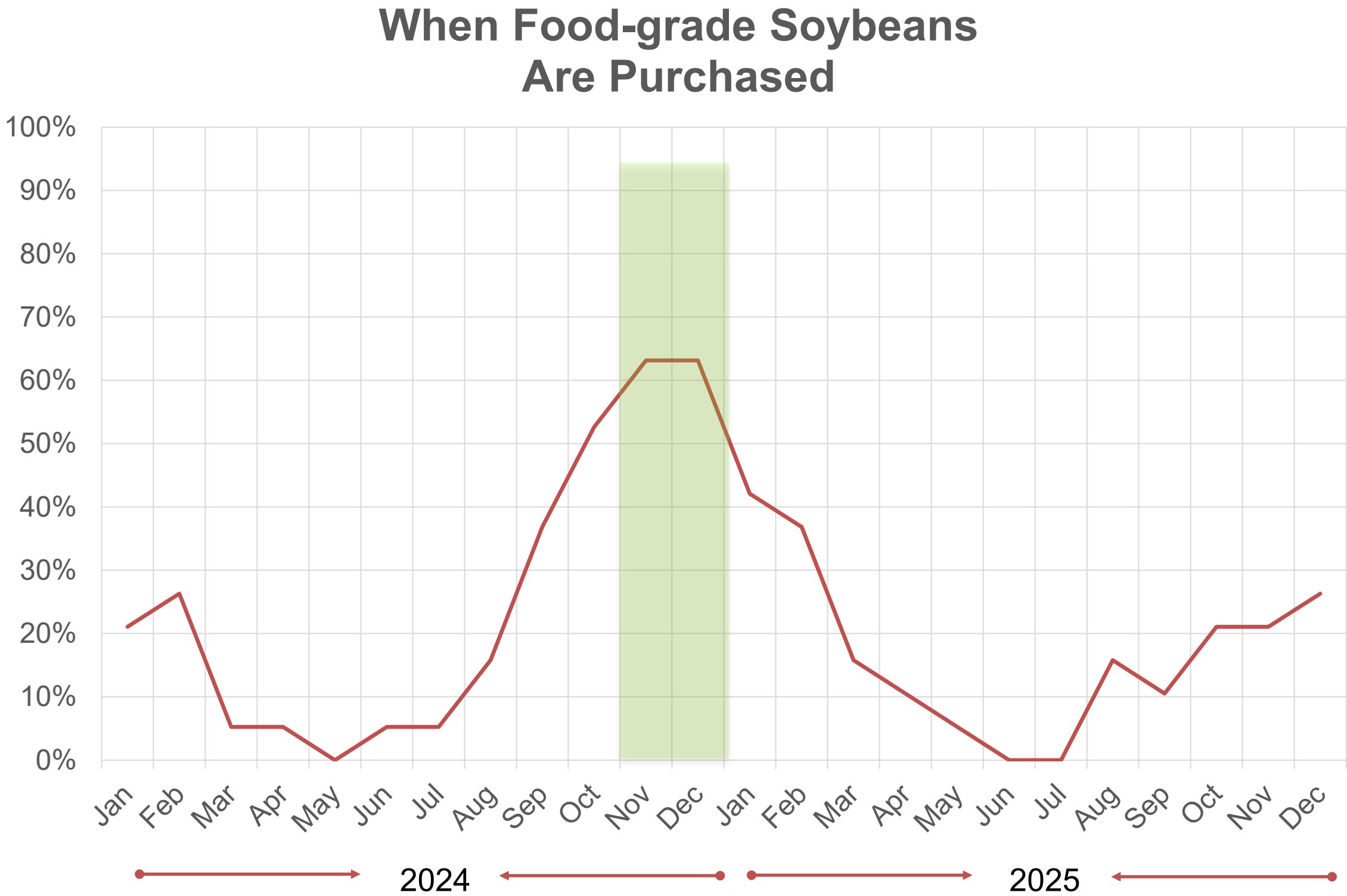
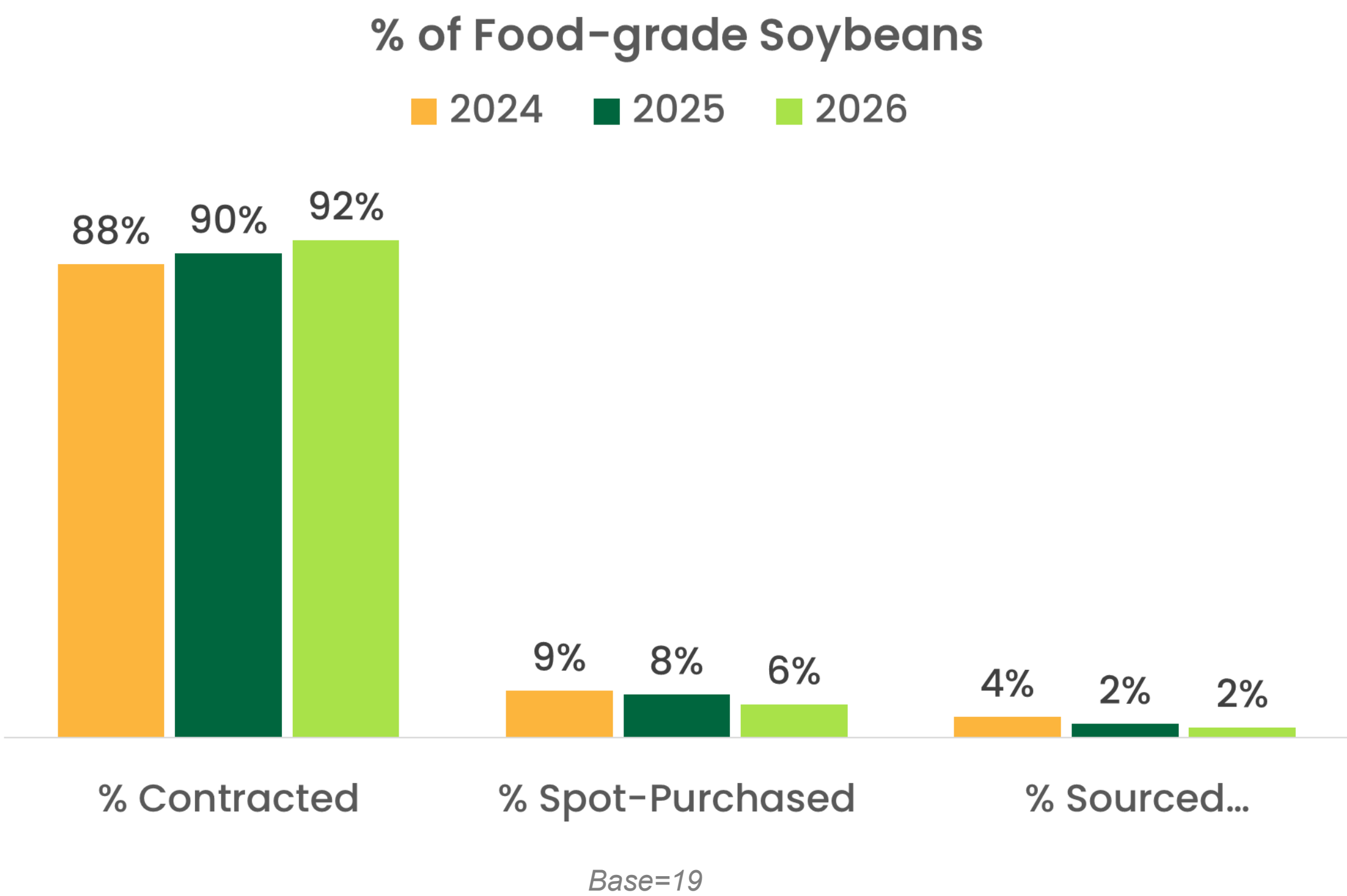
Exporter Trends in Non-GMO Soybean Contracting

- Market is long beans

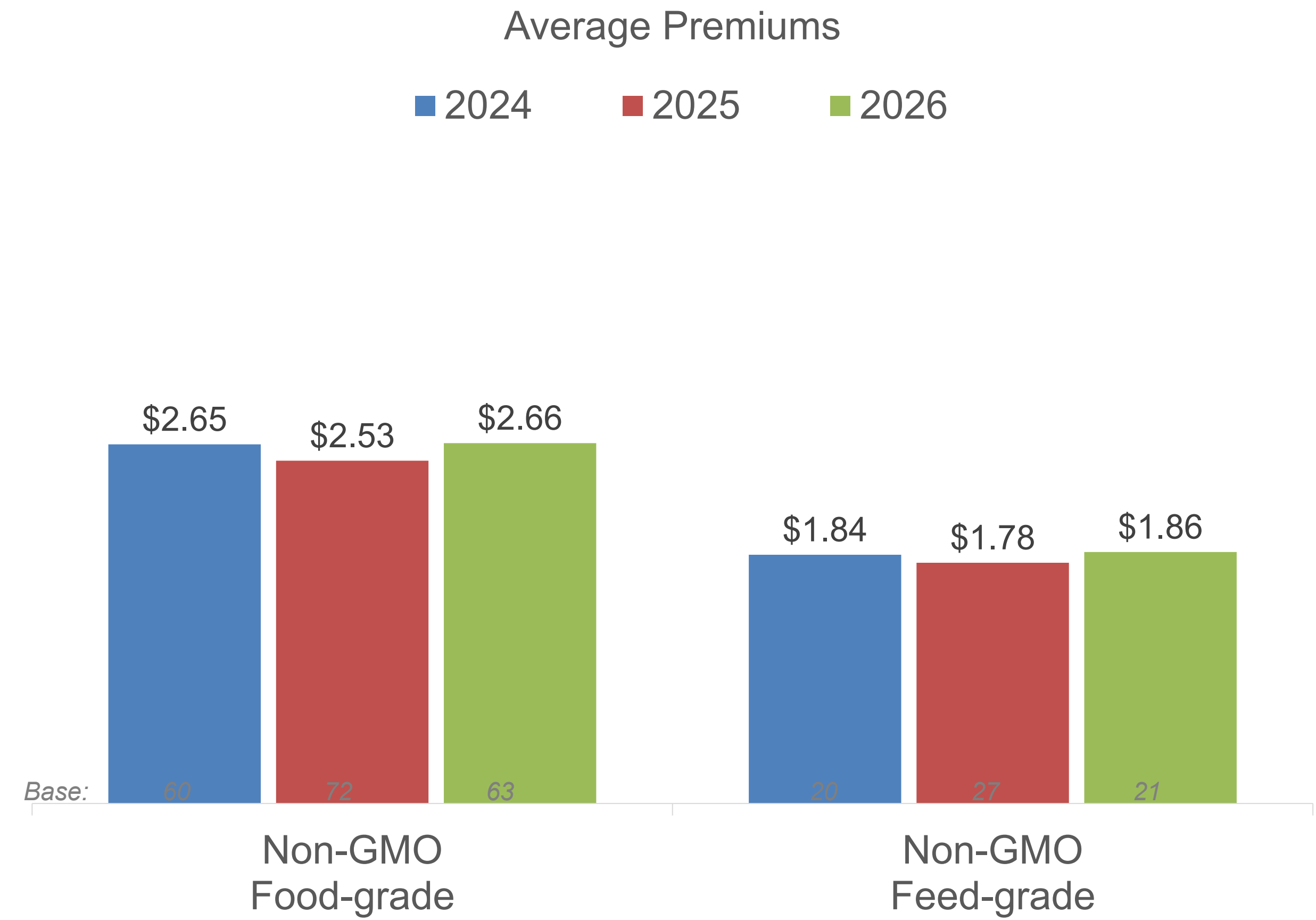


Exporters-Contracting Soy Food Beans

- Over the past year, more purchasers have used contracts to acquire food-grade soybeans rather than other methods. This trend is expected to continue in 2026.
- The peak time when purchasers decided on the quantity of non-GMO food-grade soybeans they would purchase in 2025 was in November/December of 2024.

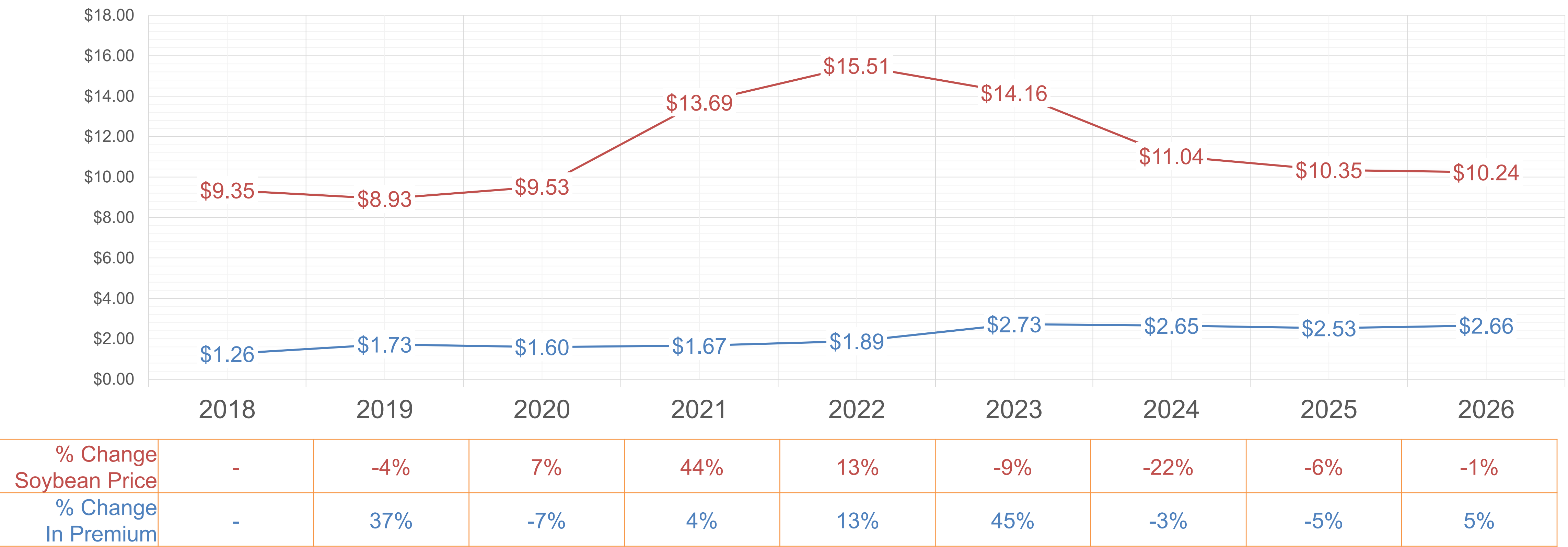


Non GMO Soybean Farm Gate Premiums

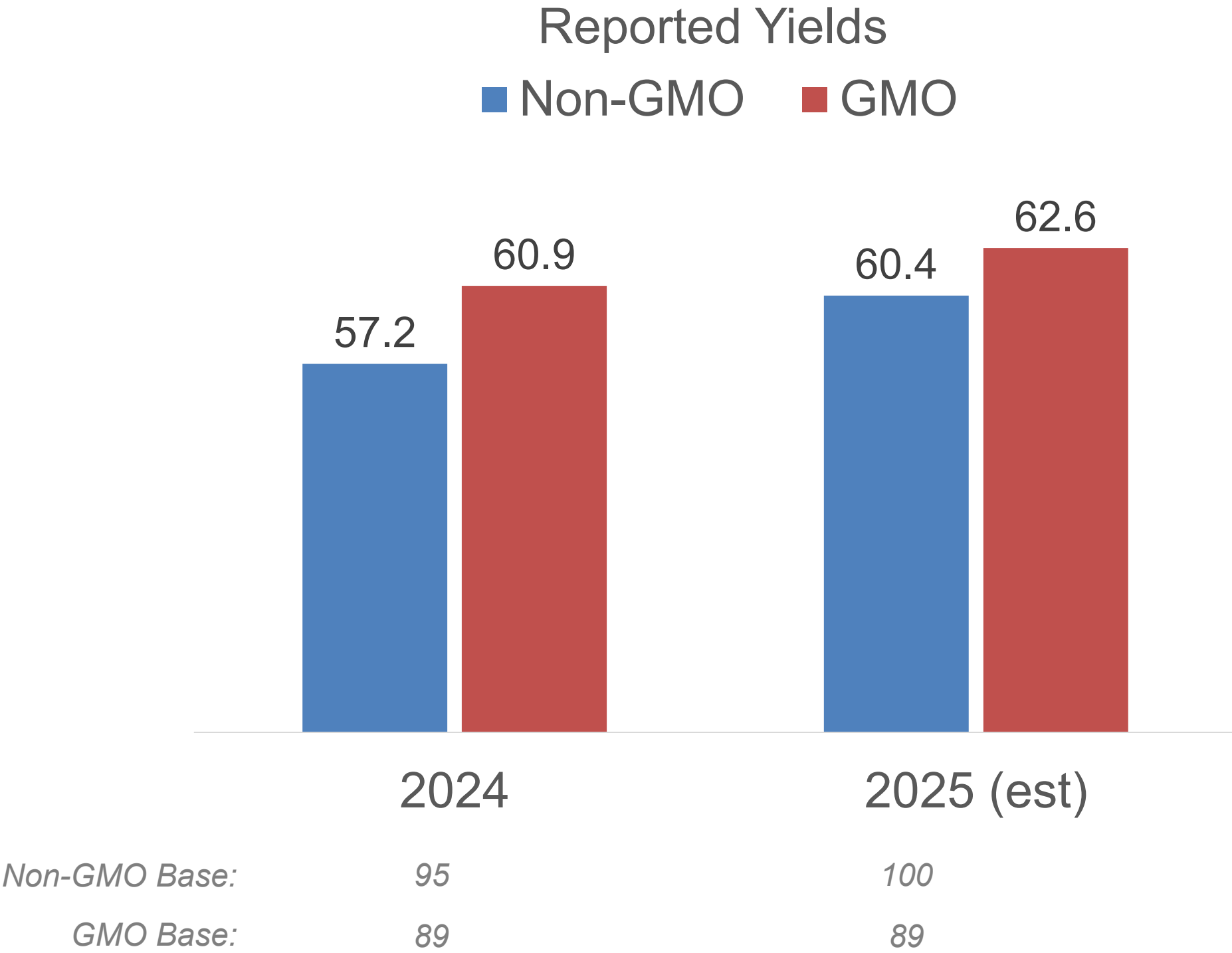
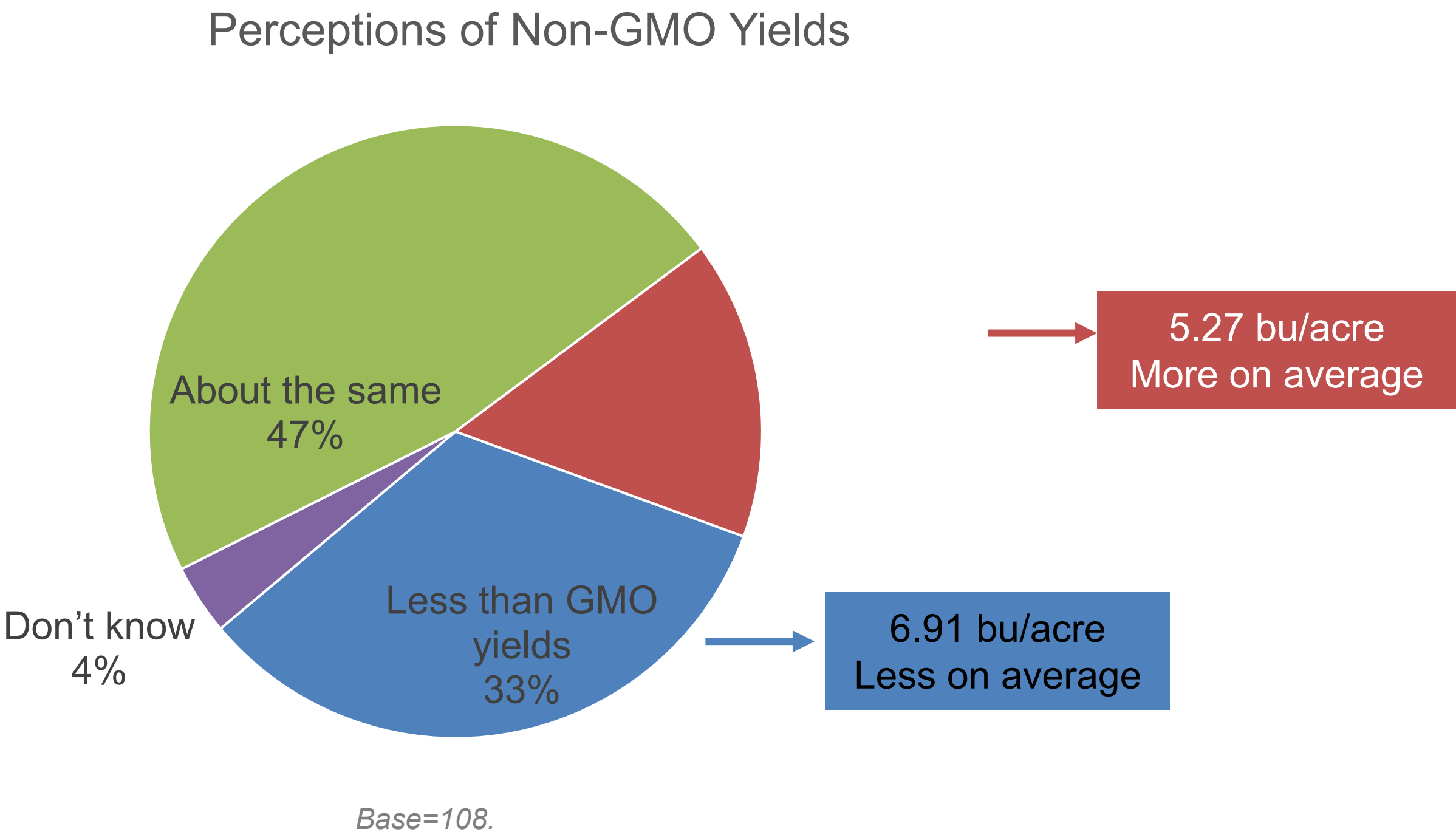


- Premiums for non-GMO soybeans are lower in 2025 compared to a year ago.
- In 2024, growers received about \$2.65/bushel for non-GMO food-grade soybeans. They expect the premium to be about 4% less in 2025.
- According to the USDA's National Weekly Non-GMO/GE Grain Report for July 2025, growers will receive a premium of \$1.85 (Eastern region) and \$2.50 (Western region) for non-GMO food-grade soybeans. The report also notes that premiums are expected to decrease by about 6% in 2025. Results from this study show premiums for non-GMO food-grade acres are expected to 4% lower in 2025, compared to 2024.¹
- IP Non-GMO feed-grade premiums are about \$0.80 less than food-grade premiums, which may explain why growers shifted from planting non-GMO feed-grade to non-GMO food-grade soybeans, given lower GM soybean prices. According to the USDA, non-GMO feed-grade prices are down 2% from last year.¹

Historical Trends in the Average Farm Gate Premium for Non-GMO Soy Food Compared to Soybean Prices



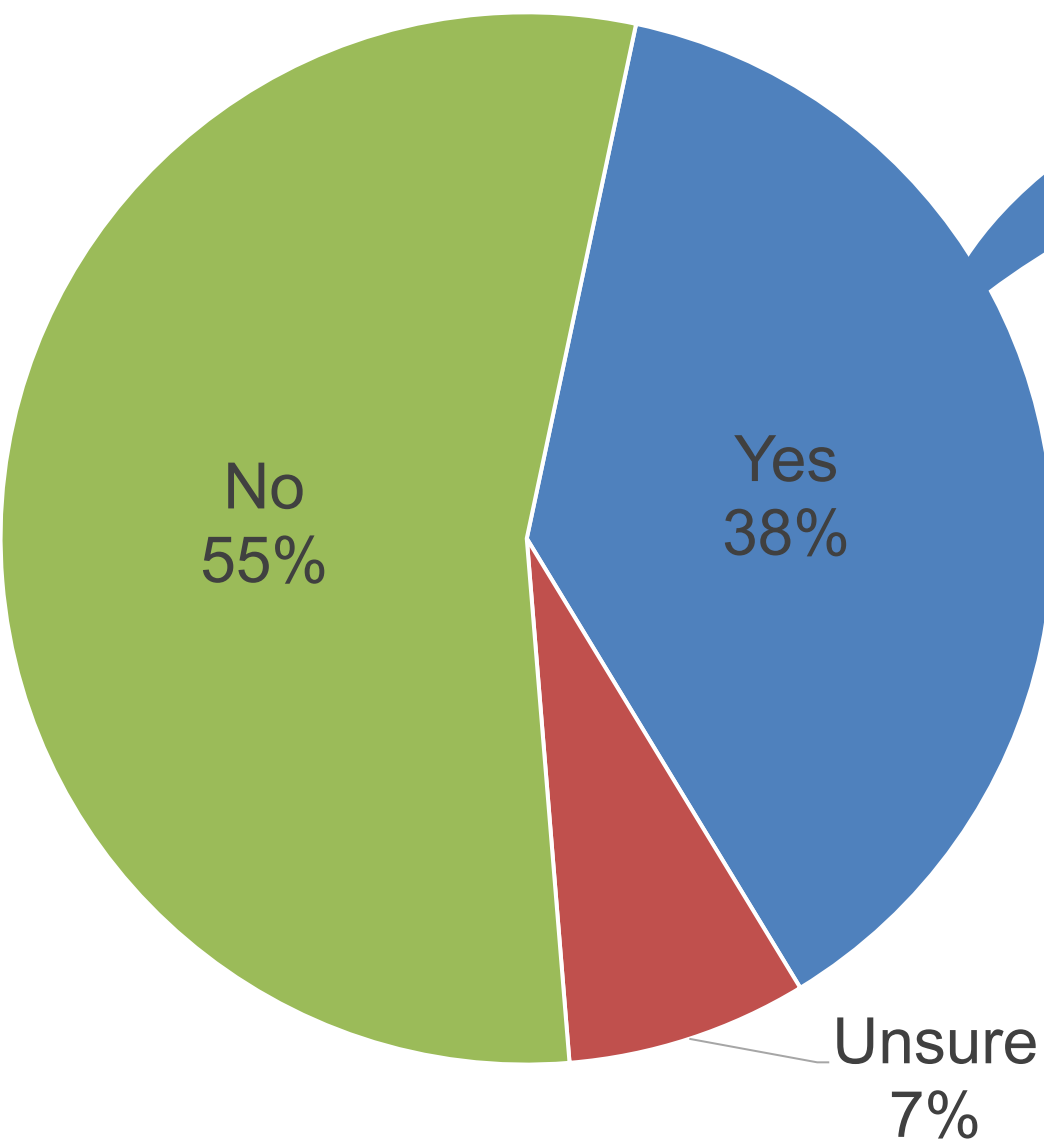
Non-GMO Soybean Yields



Source (left): How would you best describe your yields from your non-GMO soybeans, excluding organic soybeans?
Source (left): How many [more/less] bushels per acre do you get from your non-GMO soybeans? 1 Calculated based on 0 gain if “same” response, positive values if “more” response, negative values if “less” response.
Source (right): How many total bushels per acre would you estimate you get from the following types of soybeans? Excludes “0’s”. Maximum=200,.

Different Production Practices for Non-GMO Soybeans

Engage in Different Production Practices for Non-GMO Soybeans



Base=108.

Different Production Practices

Chemical Solutions	71%
Herbicide program	37%
Extra spray passes	27%
Use pre-emergents	7%
Pre-plant herbicide	5%
Use residual herbicide	5%
Higher herbicide rates	2%
Timing of spray	2%
Use a fungicide	2%
Chemical mix	2%
Use burndown	2%
Fertilizer	2%

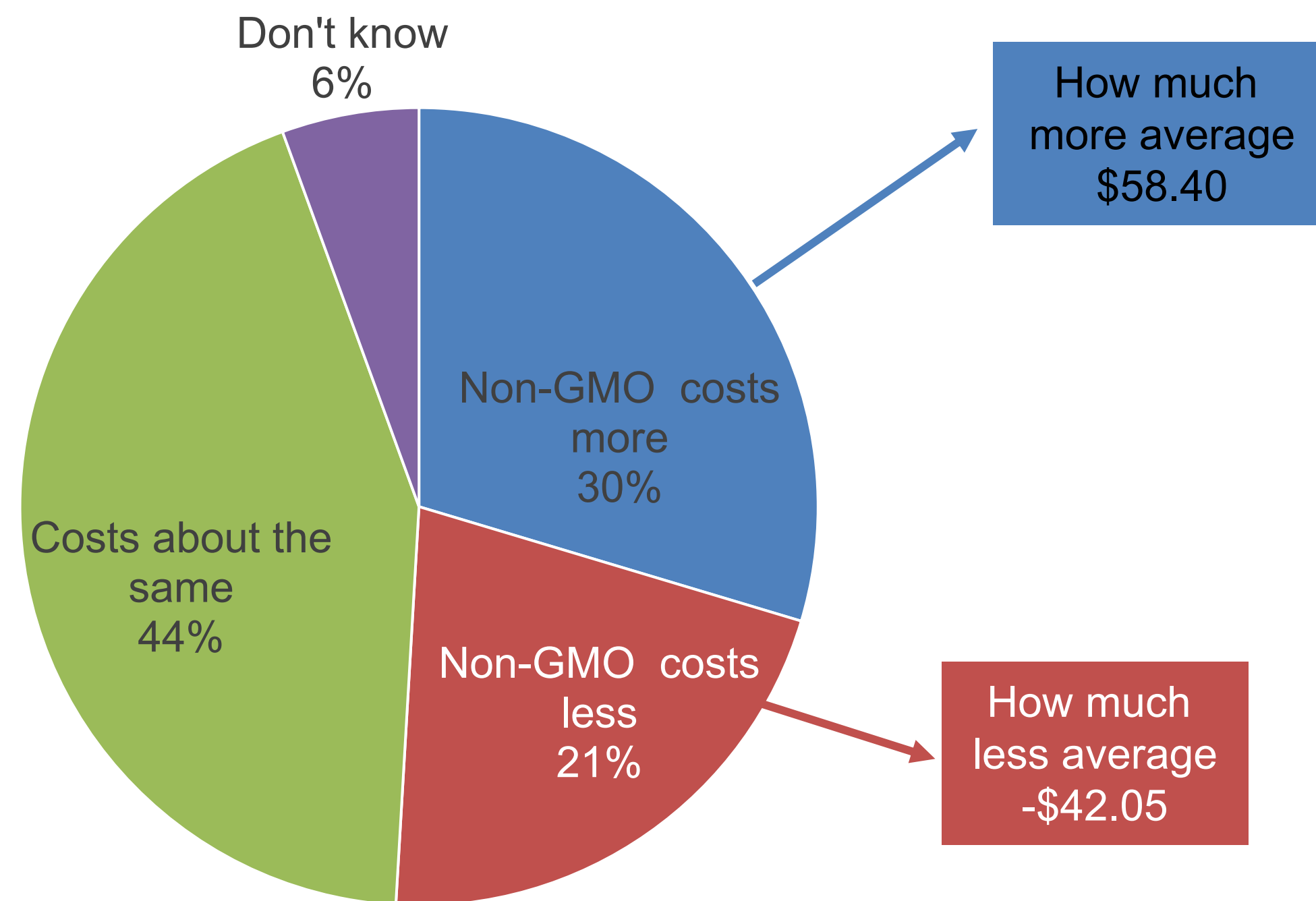
Planting Practices	34%
Tillage practices	24%
Seeding rate	5%
Cultivation	2%
Plant earlier	2%

Management Practices	10%
Remove weeds by hand	5%
Careful management	2%
Scouting	2%

Other	12%
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Base=41.

Perceived Cost of Non GMO Production Compared to GMO

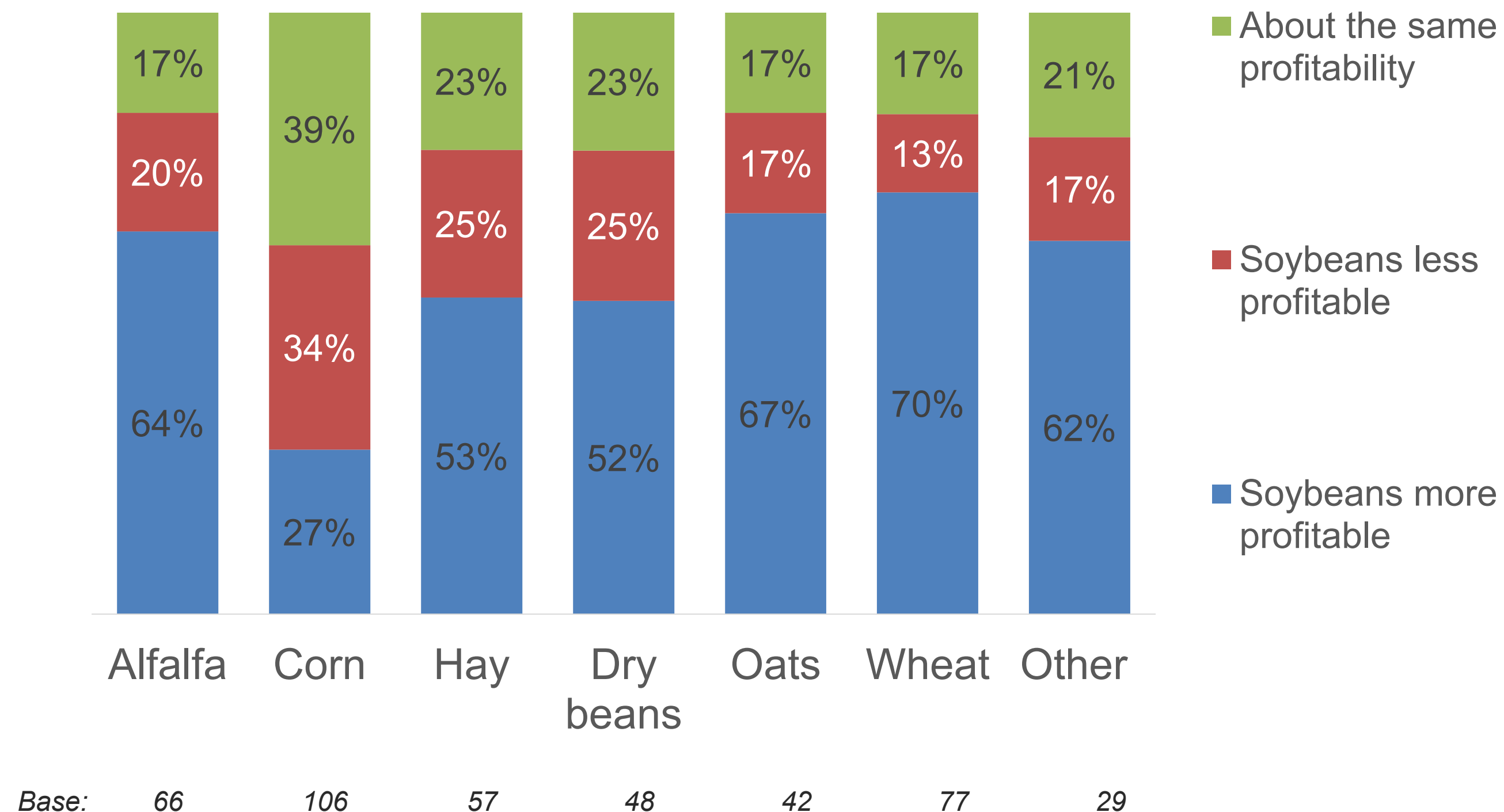


Base=108, more base=32, less base=23..

- More growers report non-GMO production compared to GM soybeans cost more to produce (30%) rather than less to produce (21%).
- On average, growers report paying a net of \$9.39 more per acre to produce non-GMO soybeans than GM soybeans.
 - Growers who contend non-GMO costs more to produce report an average of \$58.40 more to produce non-GMO soybeans than GM soybeans.
 - Growers who contend non-GMO costs less to produce report an average of \$42.05 less to produce non-GMO soybeans than GM soybeans.

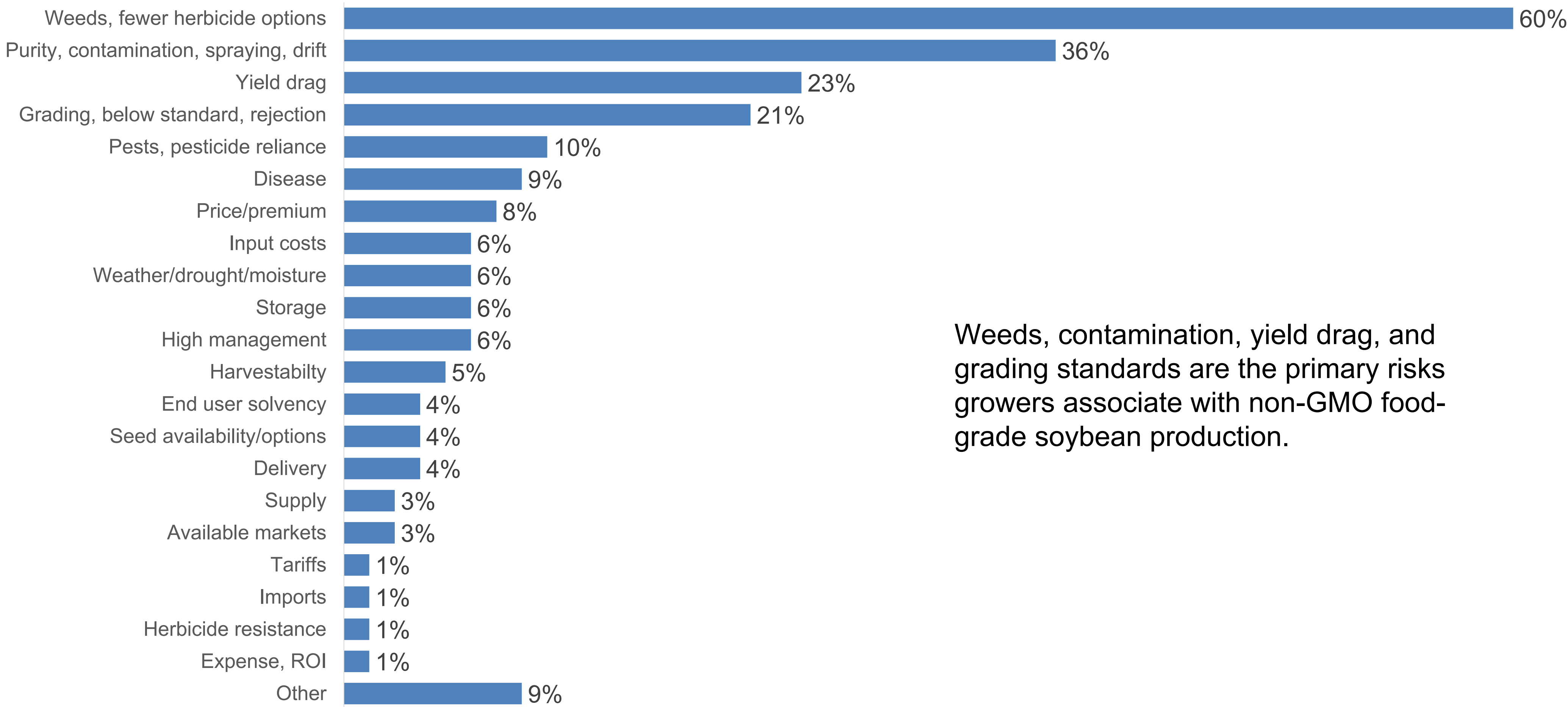
Relative Profitability of Non GMO Crops

How Profits from Soybeans Compare to Profits from Other Crops



- A majority of non-GMO soybean producers indicate soybeans are more profitable than other crops, excluding corn.
- Only 27% of non-GMO soybean producers believe soybeans are more profitable than corn, compared to 35% who believe soybeans are less profitable than corn.
- Wheat and oats are perceived to be the least profitable crops relative to soybeans.

Risks Associated with IP Non-GMO Soy Food Production



Weeds, contamination, yield drag, and grading standards are the primary risks growers associate with non-GMO food-grade soybean production.

Base=77



Soy Database



Will McNair
Contact

Updates to Soy Food Database

- 11s/7s data protocol
- Working to update map
- New varieties, including several non-commercialized
- Updates expected in February 2026

Specialty U.S. Soy Database

🔍 品種を検索...

フィルター

使用目的

- ☐ Specialty Animal Feed
- ☐ High Oleic
- ☐ High Protein
- ☐ Low Lipo
- ☐ 味噌
- ☐ 納豆
- ☐ 豆乳
- ☐ しょうゆ
- ☐ 豆腐
- ☐ 一般的な使用

タイプ

タンパク質レベル範囲 (ドライ) ドライ 13%

31 to 50

SORT PROTEIN ^ G/100 ^ 11/7S ^ YEAR 2020 2021 2022 2023 2024

パラエティ	COMPARE
 10.2	 2.4
使用目的 General Use	種類 Non-GM
ヒルムカラー White, Yellow, Clear	ヒルムカラー White, Yellow, Clear
サイズ Large	サイズ Large, Medium
G/100 シード 20.1	G/100 シード 19.75
タンパク質 (DRY) 41.85	タンパク質 (DRY) 42.885
油 13% 19.11	油 13% 17.595



SSOY