

Non-GMO Soybeans Acreage Study Final Report 2026

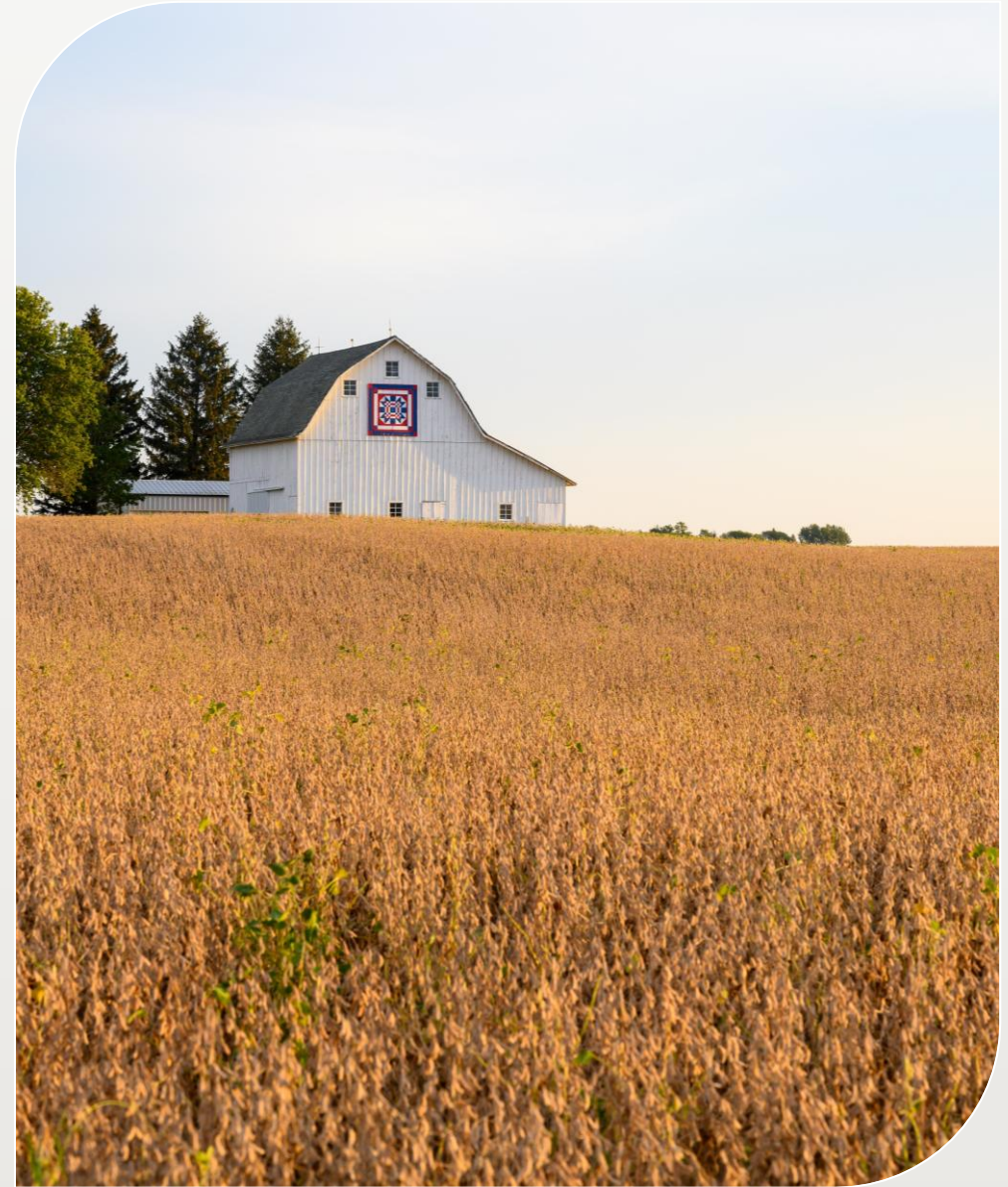
Study Background

Purpose & Data Collection



Study Purpose

The purpose of this research is to obtain updated information about the number of identity-preserved (IP) non-GMO food-grade and feed-grade soybeans produced in the U.S. and to identify trends and market factors that impact production.

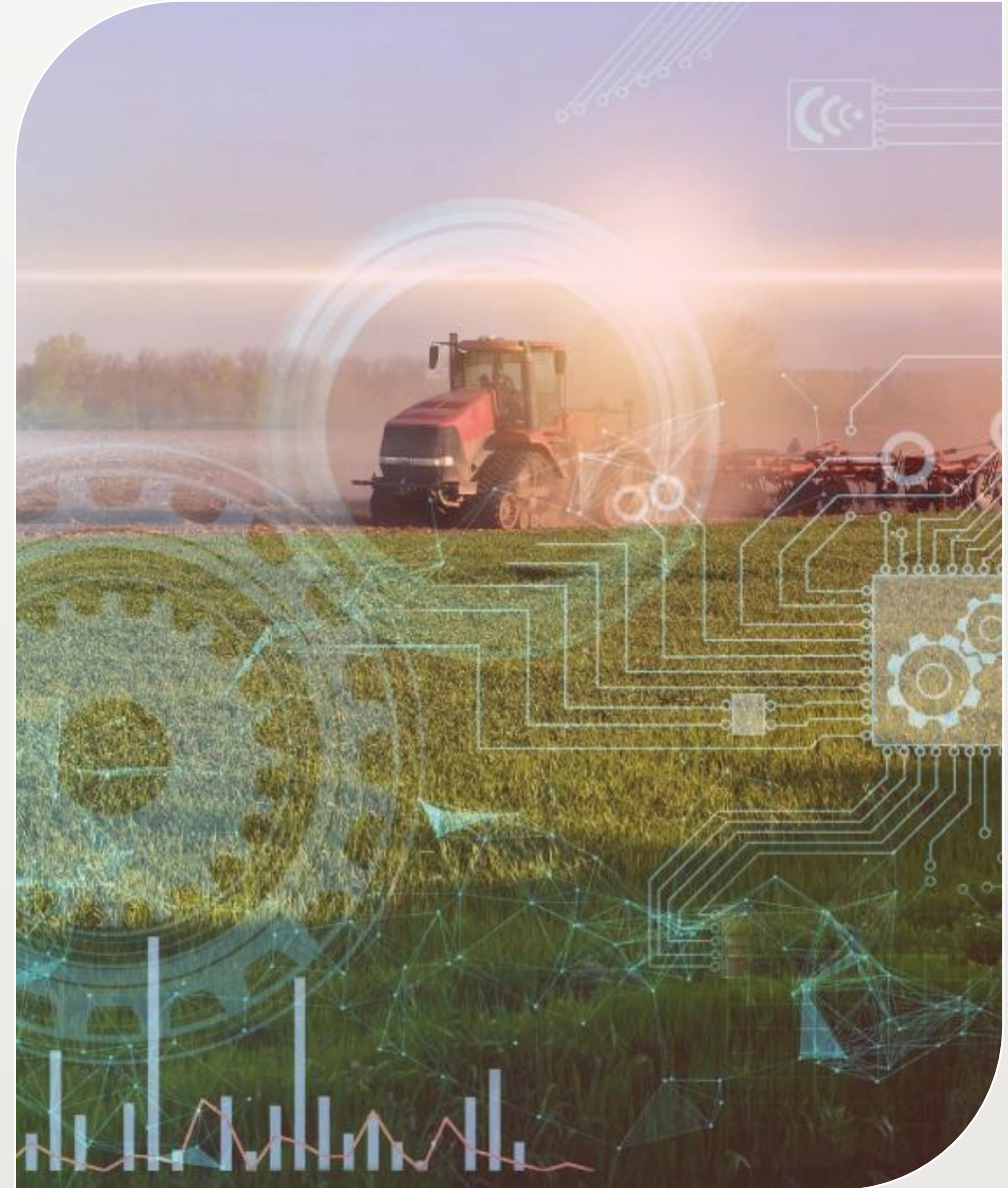


Sources of Information

Input was obtained from two key stakeholders in non-GMO production and marketing:

1. Growers that produce IP non-GMO food-grade or feed-grade soybeans.
2. Companies that purchase and export IP non-GMO food-grade or feed-grade soybeans (purchasers).

In conjunction with USDA data and other secondary information, this study aims to provide a comprehensive view of the non-GMO soybean market.



How Input is Used

Growers

Data is used to determine U.S. production of non-GMO soybeans, both food-grade and feed-grade, and market forces that impact current and future production.

Purchasers

Input is used to assess current and trending export markets, U.S. competitiveness, and market signals that influence the outlook for U.S.-produced non-GMO soybeans on the global stage.



USDA Secondary Information

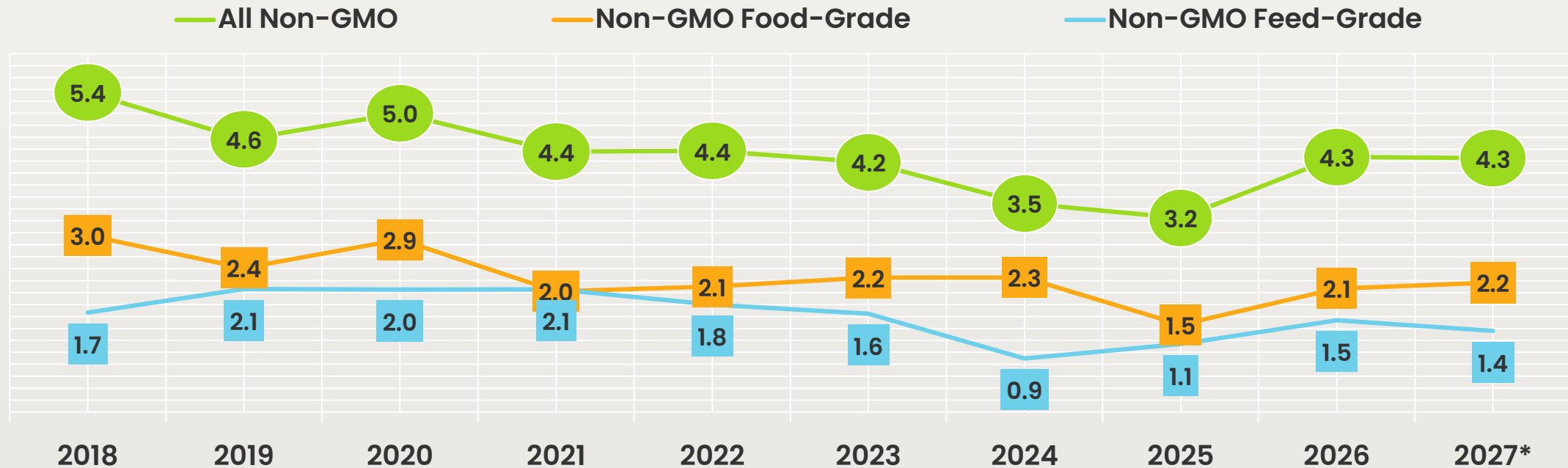
Type of Information	2025	2026
Total U.S. soybean acres planted (millions) ¹	81.2	85.4
Total U.S. soybean bushels (millions)	4,262	4,435
U.S. non-GM soybean acres (millions) ¹	3.2	4.3
% of U.S. non-GM soybeans marketed without premium ²	19%	19%
U.S. non-GM soybeans marketed without premium	0.61	0.82
U.S. Non-GM soybeans marketed for premium (millions)	2.6	3.5
Average GM soybean yield (bushels/acre) ¹	53	53*
Estimated metric tons of U.S. soybeans exported (millions) ³	41.1	44.4
Estimated bushels of U.S. soybeans exported (millions) ³	1,510	1,630

Executive Summary

U.S. Non-GMO Soybean Acre Estimates

Overall soybean production increased by 5% between 2025 (81.2 million acres) and 2026 (85.4 million acres). Non-GMO acres increased by 31% between 2025 and 2026, after five years of declining production. The increase was almost evenly divided between food-grade (40% increase) and feed-grade (35% increase) acres. Looking forward to next season, while non-GMO acres are expected to remain about the same, food-grade acres will increase slightly and feed-grade acres will decrease slightly.

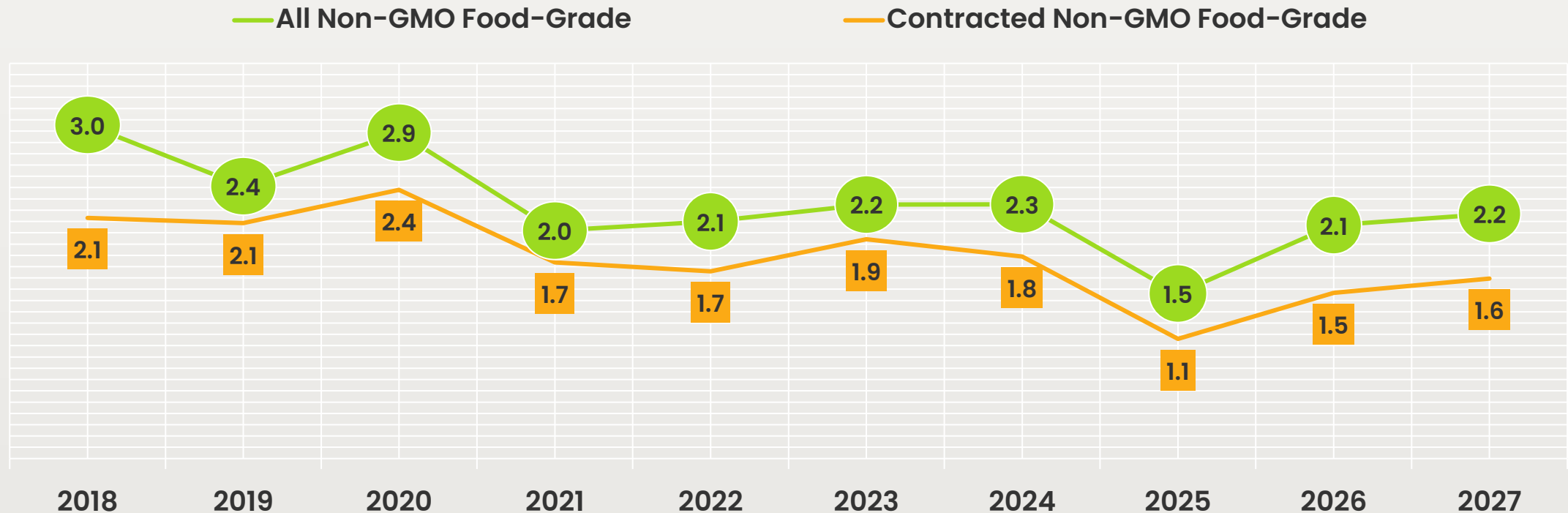
U.S. Non-GMO Soybean Acres (millions)



Non-GMO Food-Grade Soybean Acre Estimates

Contracted acres represent roughly 70% of non-GMO food-grade acres. This means of the 2 million non-GMO food-grade acres in the U.S. in 2026., approximately 1.5 million were produced under contract. This figure is expected to increase slightly in the next season to 1.6 million food-grade soybean acres planted under contract.

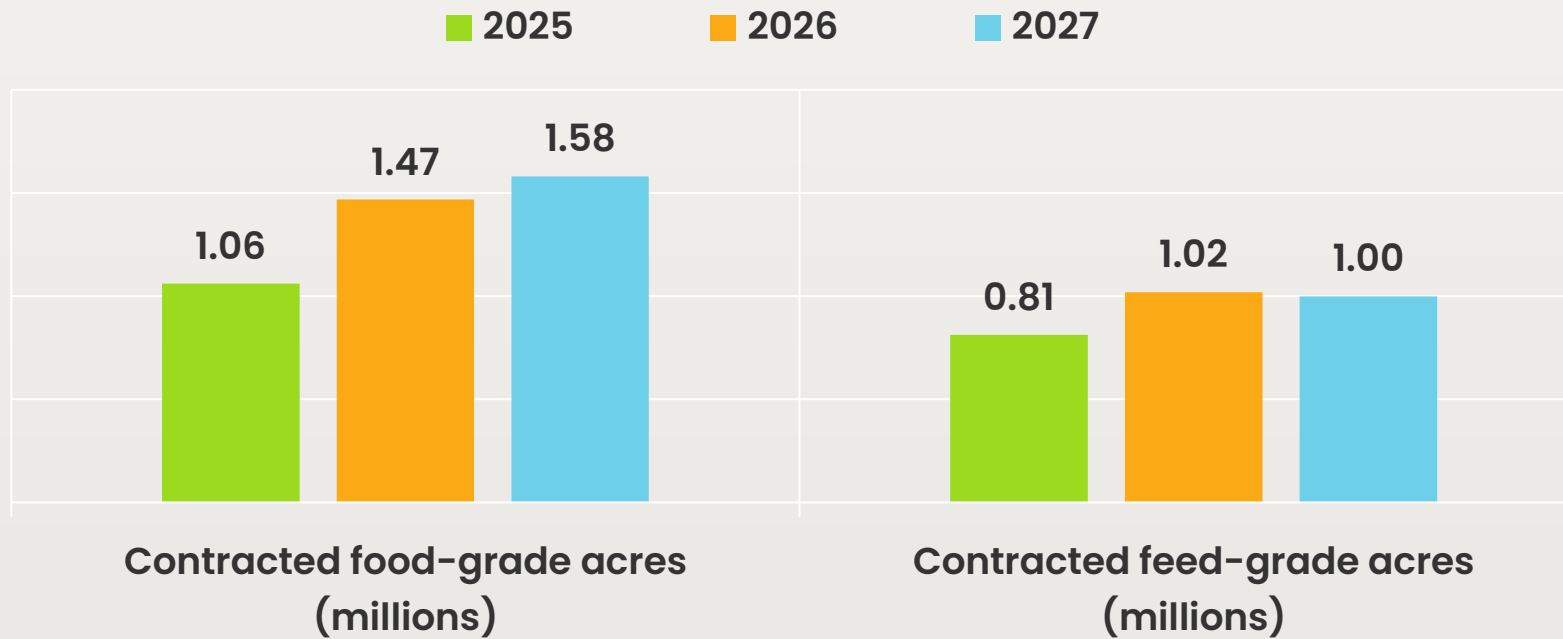
U.S. Non-GMO Soybean Acres (millions)



Contracted Non-GMO Soybean Acre Estimates

Contracted non-GMO acres grew precipitously in 2026, as 2025 trade tariffs tensions eased. However, this recovery is expected to slow in 2027, especially for non-GMO feed-grade soybeans. In 2027, contracted non-GMO food-grade acres are expected to increase by about 8%, much less than the 39% increase expected in 2026. Non-GMO feed-grade acres are expected to decrease by about 2% in 2027, after increasing 25% in 2026.

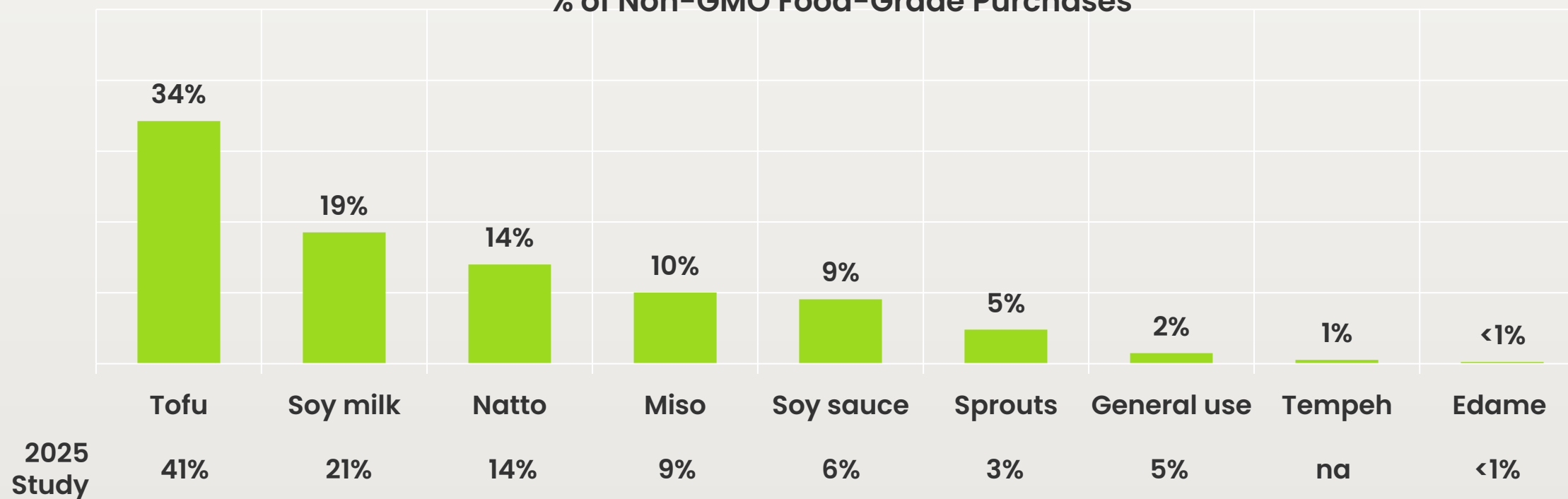
Estimated Non-GMO Soybean Acres Produced Under Contract



Non-GMO Food-Grade Soybeans End-Purpose

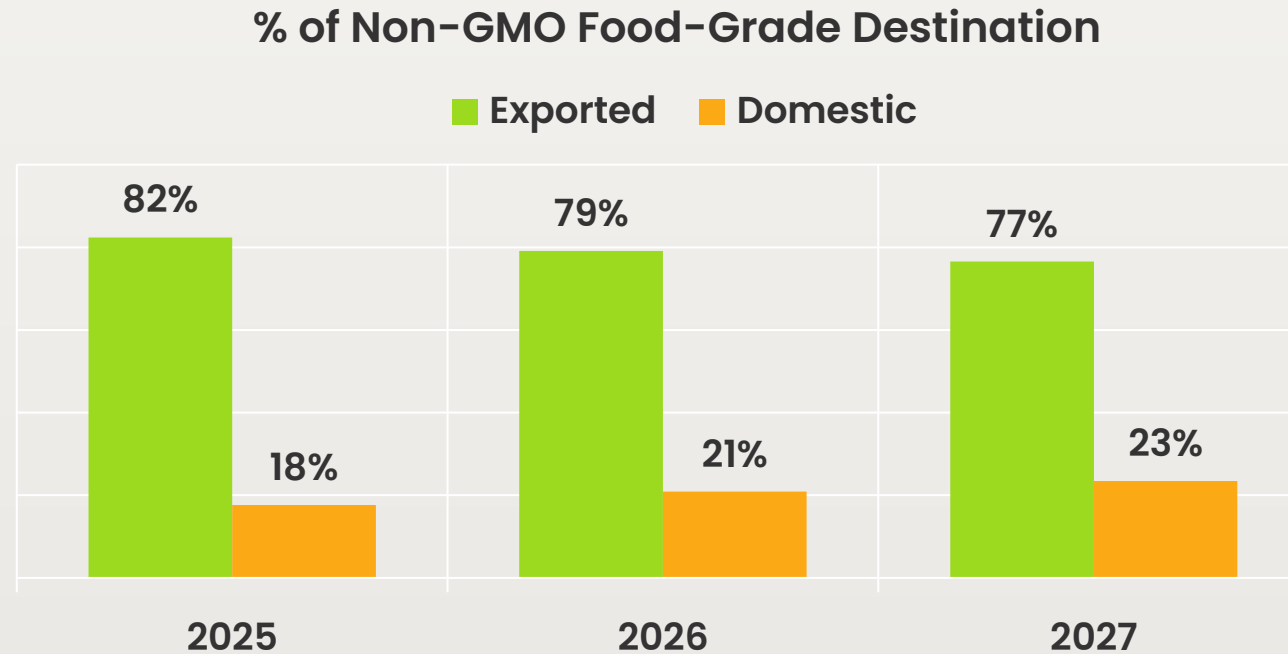
U.S.-produced non-GMO food-grade soybeans are used in a variety of end products. The bulk will be used for tofu (34%), soy milk (19%) and natto (14%). However, compared to the 2025 study and purchasers' comments about trends in end-uses, tofu use is declining, as one purchaser notes, *It's increasing for miso market, and decreasing for tofu market*. Another purchaser concurs, ... *tofu bean consumption is down*.

% of Non-GMO Food-Grade Purchases



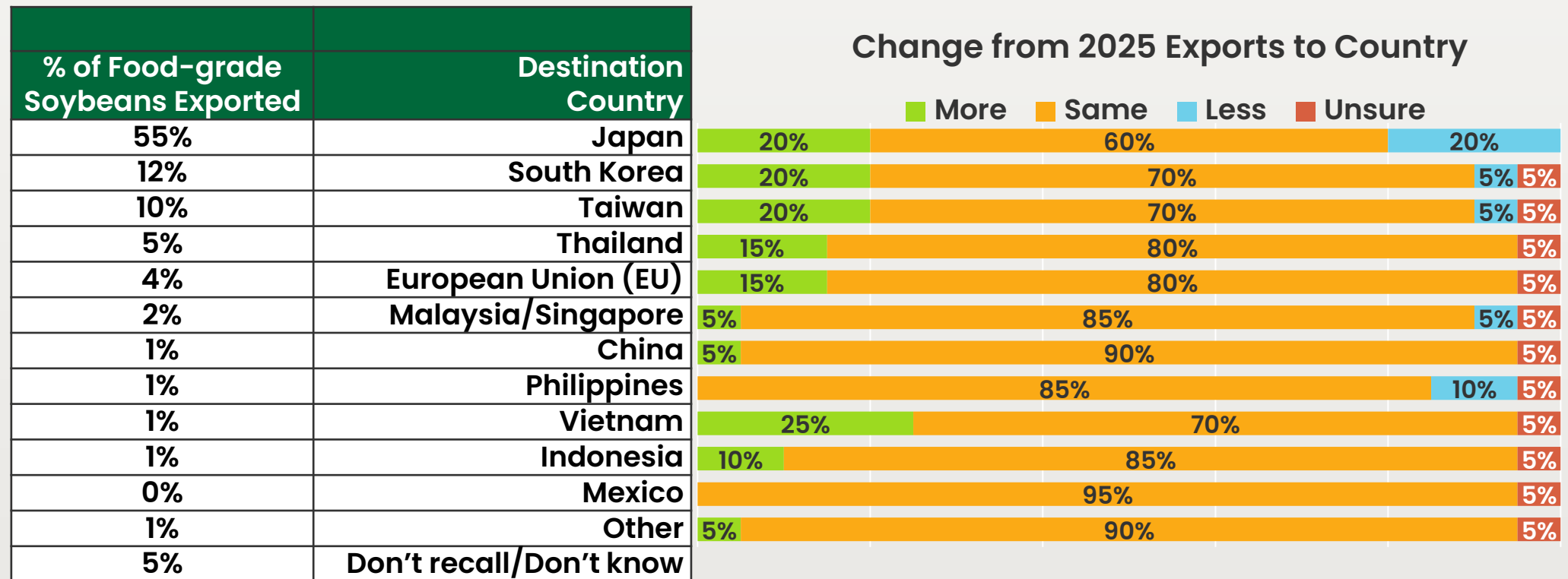
Non-GMO Food-Grade Soybeans Export and Domestic Use

Roughly about 80% of U.S.-produced non-GMO food-grade soybeans are exported each year. However, results show increasing domestic use and decreasing exports.



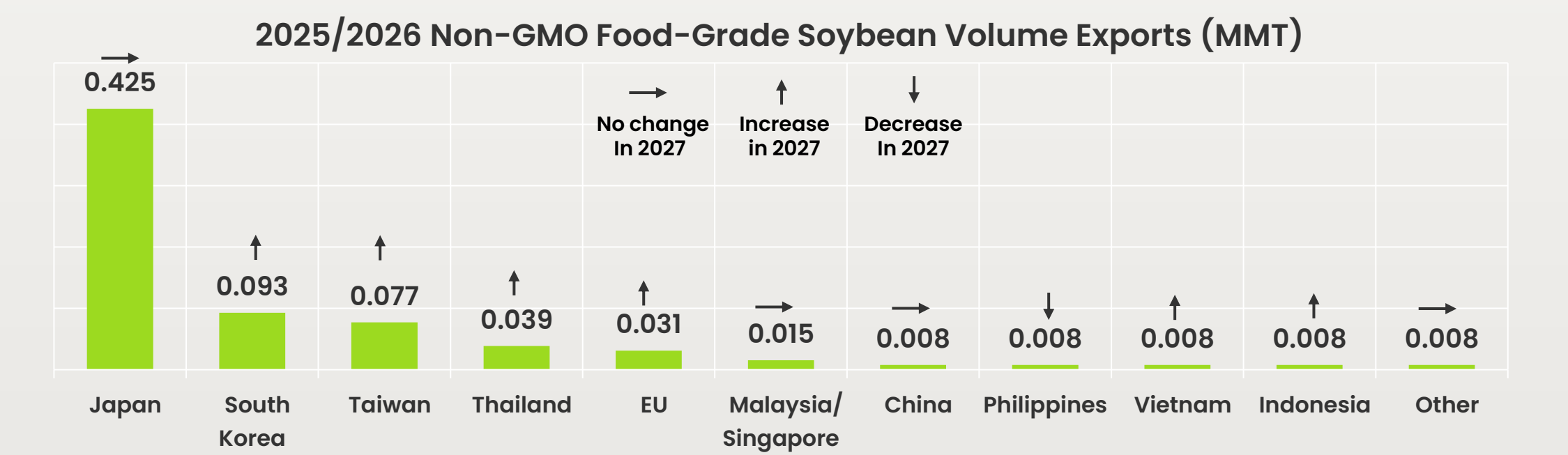
Exporter Reported Export Countries

In 2025, about half of all U.S.-produced non-GMO food-grade soybeans were exported to Japan (55%). Japan will still be the primary export market for U.S.-produced non-GMO food-grade soybeans in 2026; however, purchasers expect to increase exports to smaller markets such as Indonesia, South Korea and Taiwan this year.



Estimated Destination Countries for U.S.-Produced Non-GMO Food-Grade Soybeans

Japan is expected to receive the bulk of U.S.-produced non-GMO soybeans in 2026 (0.43 MMT). In 2025, the U.S. exported 2.3 MMT of soybeans to Japan, of which 19% were food-grade. FAS/Tokyo forecasts that the food use consumption of soybeans will remain at 900,000 MT in MY 2025/26 and MY 2026/27, consequently, non-GMO food-grade exports to Japan are expected to remain stable next year. Smaller secondary markets, however, are expected to increase imports of U.S.-produced non-GMO food-grade soybeans. These markets include: South Korea, Taiwan, Thailand, the European Union (EU), Vietnam and Indonesia.

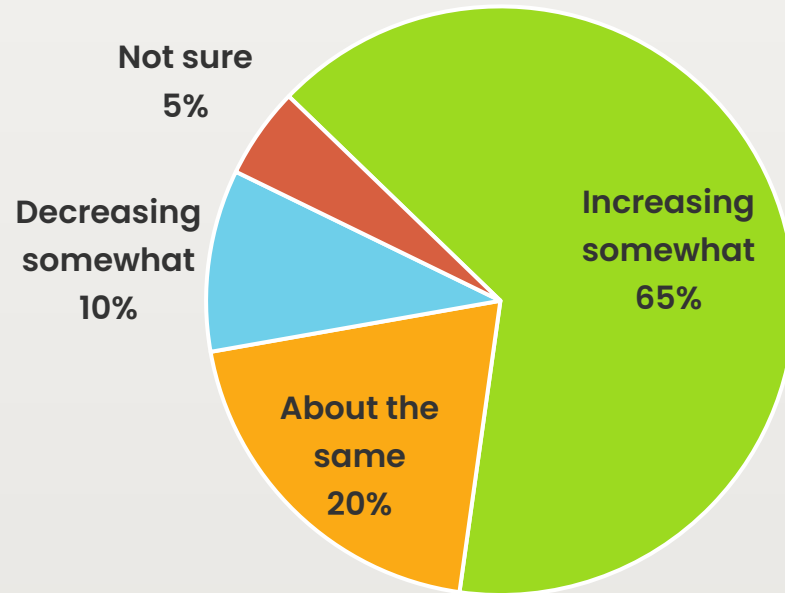


Sources: USDA/NASS, July 2026. 2 USDA/World Agricultural Supply and Demand Estimates (WASDE), July 2026.
USDA, Economic Research Service, Oil Crops Outlook: June 2026, OCS-26f, June 15, 2026.
3 Includes only contracted food-grade soybean acres that met export standards, excludes over-contracted and surplus food-grade acres.
4 Assumes non-GMO growers' acres account for 4% of all soybean acres in 2025 and 5% in 2026.

State of Domestic Demand for Non-GMO Food-Grade Soybeans

Most purchasers report that domestic demand for non-GMO food-grade soybeans is *increasing somewhat* (65%), primarily due to increasing consumer demand and a variety of soybean food product offerings.

State of Domestic Demand for Non-GMO Food-Grade Soybeans



Reason for Domestic Increase (Verbatim Comments)
US diet changes.
The <i>soybean products</i> get popular. The number of Asian culture people is increasing.
The increase in domestic demand for U.S. non-GMO food-grade soybeans is likely being driven by <i>growing consumer interest</i> in clean-label non-GMO and plant-based foods along with expansion of domestic tofu soy milk and specialty soy food manufacturing. More U.S. food companies are also emphasizing traceability and locally sourced ingredients to meet retailer and consumer expectations. In addition, supply chain disruptions over the past few years encouraged some processors to source more soybeans domestically rather than relying heavily on imports or export-dependent channels.
No GMO crush.
<i>More retail offerings</i> nationwide.
More feed capacity and steady <i>increase in soy food sales</i> .
More <i>acceptance of soy being a healthy choice</i> The soy industry needs to constantly promote soy... dairy does it all the time and they continue to grow and expand their markets

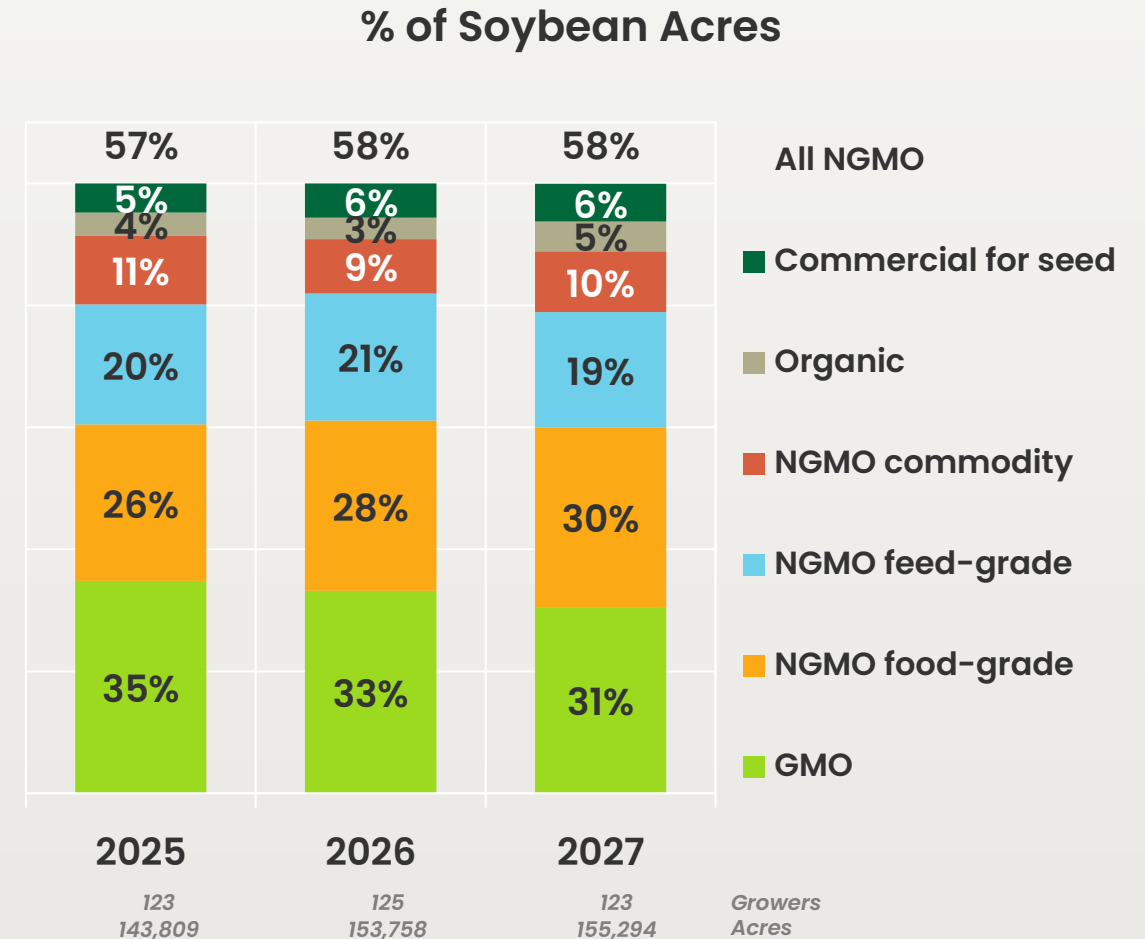


Findings from Growers

Distribution of Non-GMO Growers' Soybean Acres

- Roughly 60% of non-GMO soybean growers' acres are dedicated to non-GMO soybean production, 28% of which is food-grade soybeans in 2026.
- Non-GMO feed-grade acres increased in 2026 from an estimated 12% that was reported in the 2025 study year to 21% reported in the current study. Most feed-grade soybean acres were planted by growers in Illinois, Iowa and South Dakota, and replaced GMO soybeans.

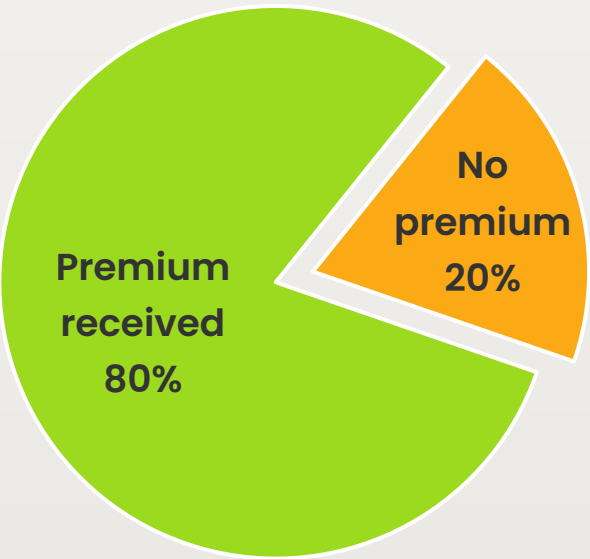
2026 Soybean Acres	2025 Study	Current Study
GMO acres	39%	33%↓
Non-GMO food-grade acres	36%	28%↓
Non-GMO feed-grade acres	12%	21%↑



Non-GMO Soybeans Sold as Commodity

About 20% of non-GMO soybeans were sold on the commodities market in 2025. Growers sold non-GMO soybeans on the commodities market primarily to reduce input costs (79%), especially seed costs, or as part of their crop rotation (67%).

% of Non-GMO Soybeans Sold
With No Premium in 2025



Base=125.

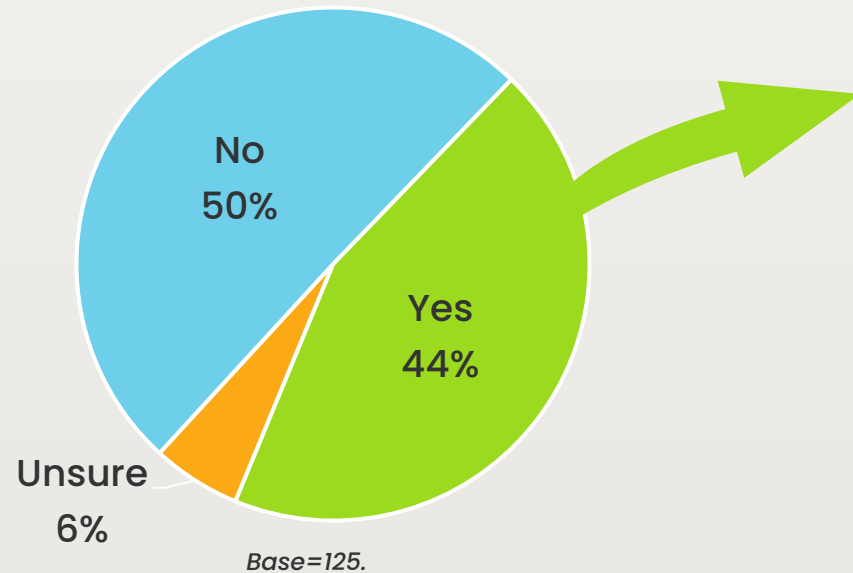
Purpose of Selling Non-GMO
Soybeans without a Premium*

Purpose	2025
Reduce inputs	79%
Reduce seed cost	67%
Reduce other inputs	42%
Tech/licensing fee	8%
Rotation	67%
Minimize herbicide resistance	38%
Did not meet IP standards	4%
Produced over the contracted amount	38%
No available local markets, couldn't sell them	17%
Other	
Base	24

Production Practices for Non-GMO Soybeans

Approximately 44% of non-GMO soybean growers report using different production practices for non-GMO soybeans, most of whom use different chemical solutions (78%). One grower explains, *We use Roundup, Liberty and 2,4-D on our GMO vs. Fomesafen and Zidua Pro on our non-GMO acres.*

Engage in Different Production Practices for Non-GMO Soybeans



Chemical Solutions 78%

Herbicide program	55%
Extra spray passes	18%
Use residual herbicide	5%
Insecticide use	5%
Use pre-emergents	4%
Timing of spray	4%
Use a fungicide	4%
Pre-plant herbicide	2%

Planting Practices 29%

Tillage practices	20%
Cultivation	5%
Plant earlier	2%
Field placement	2%
Borders, segregate field	2%

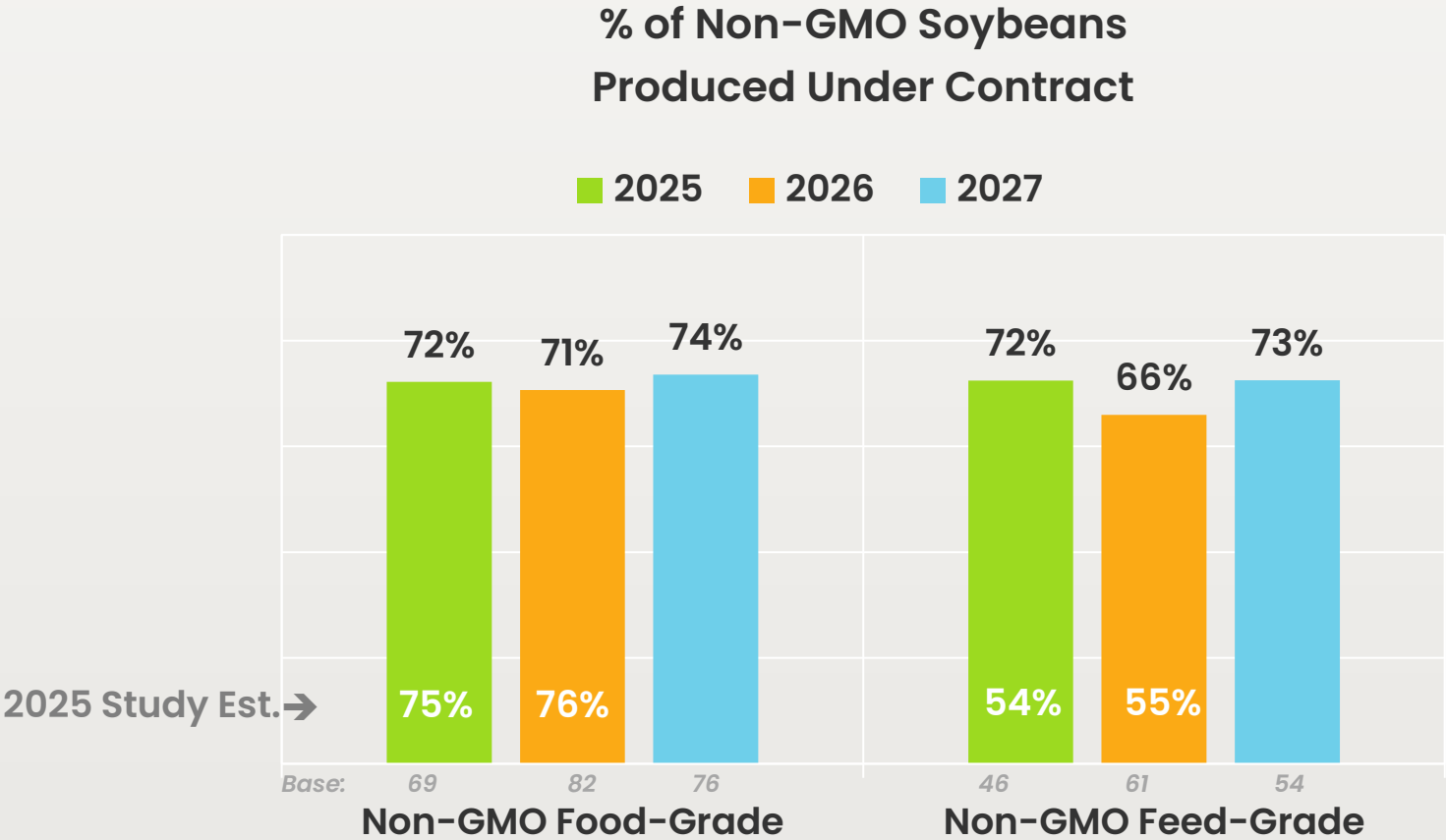
Management Practices 26%

Careful management	11%
Remove weeds by hand, mechanical weeding	9%
Keep them segregated	4%
Clean equipment thoroughly	2%
Scouting	2%

Other 7%

Base=55.

Non-GMO Soybeans Produced Under Contract



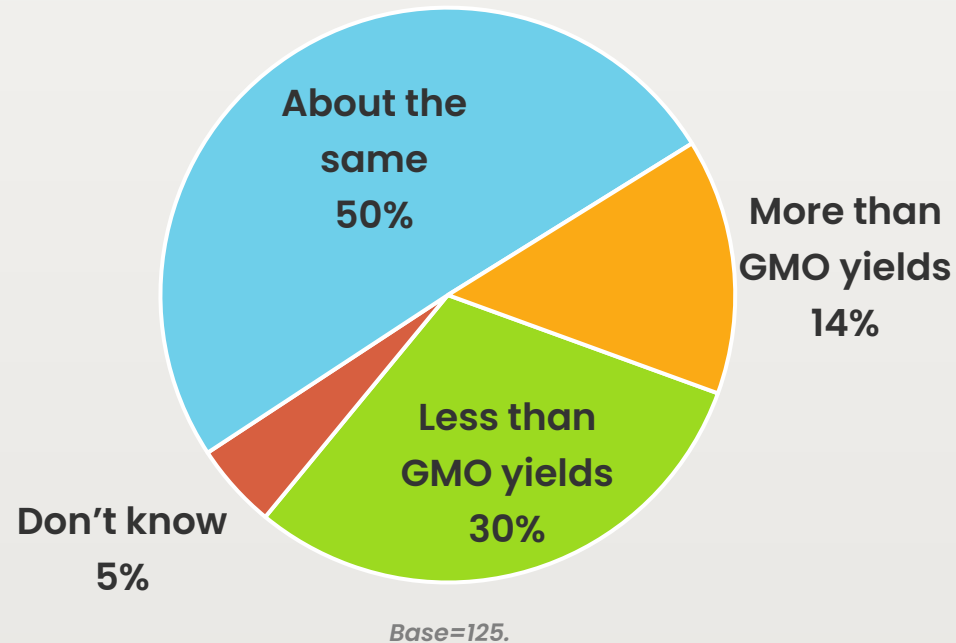
Roughly 70% of non-GMO soybeans, both food-grade and feed-grade, are produced under contract each year.

Compared to the 2025 study, contracted non-GMO food-grade acres decreased slightly, but contracted non-GMO feed-grade acres increased precipitously. This aligns with results showing an overall increase in non-GMO feed-grade soybeans in 2025 and 2026 in the current study compared to the 2025 study estimates.

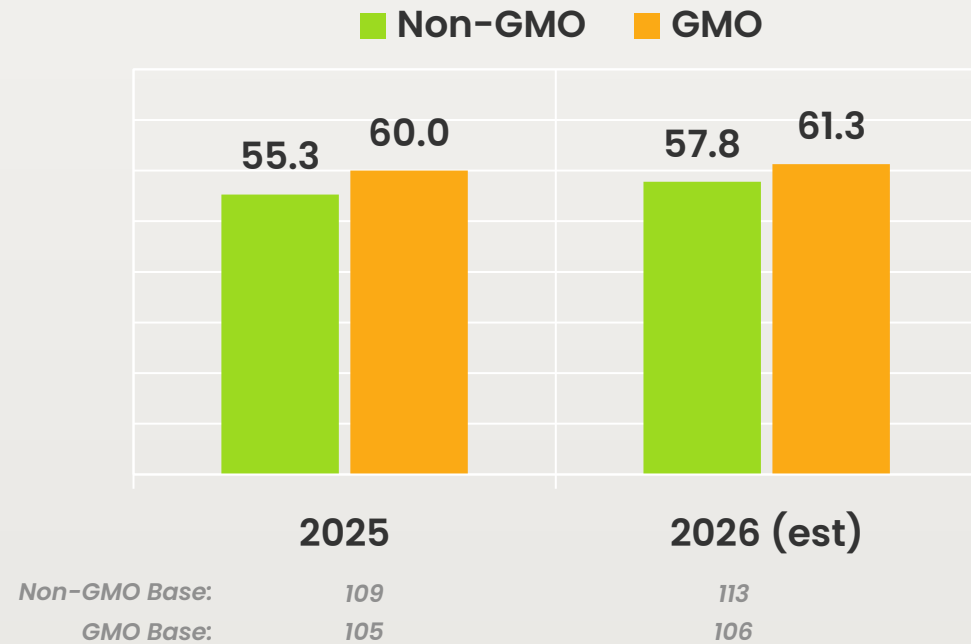
Reported Non-GMO Soybean Yields

Half of growers reported getting similar yields from GMO and non-GMO soybeans. The remaining growers report getting less yield from their non-GMO soybeans than from GM soybeans by a margin of 2 to 1 (30%, compared to 14% of growers who report getting more yields from non-GMO soybeans). In total, growers report getting an average of 4 to 5 more bushels/acre from GMO soybean varieties.

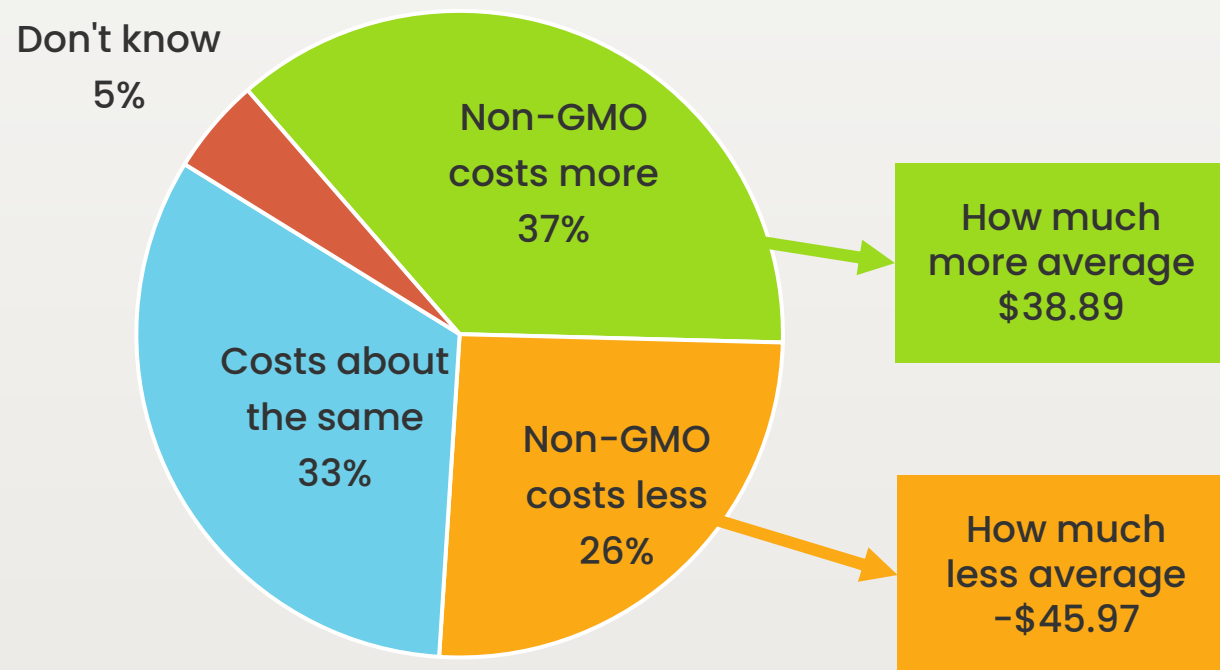
Perceptions of Non-GMO Yields



Reported Yields



Reported Cost of Producing Non-GMO Soybeans Compared to GMO Soybeans



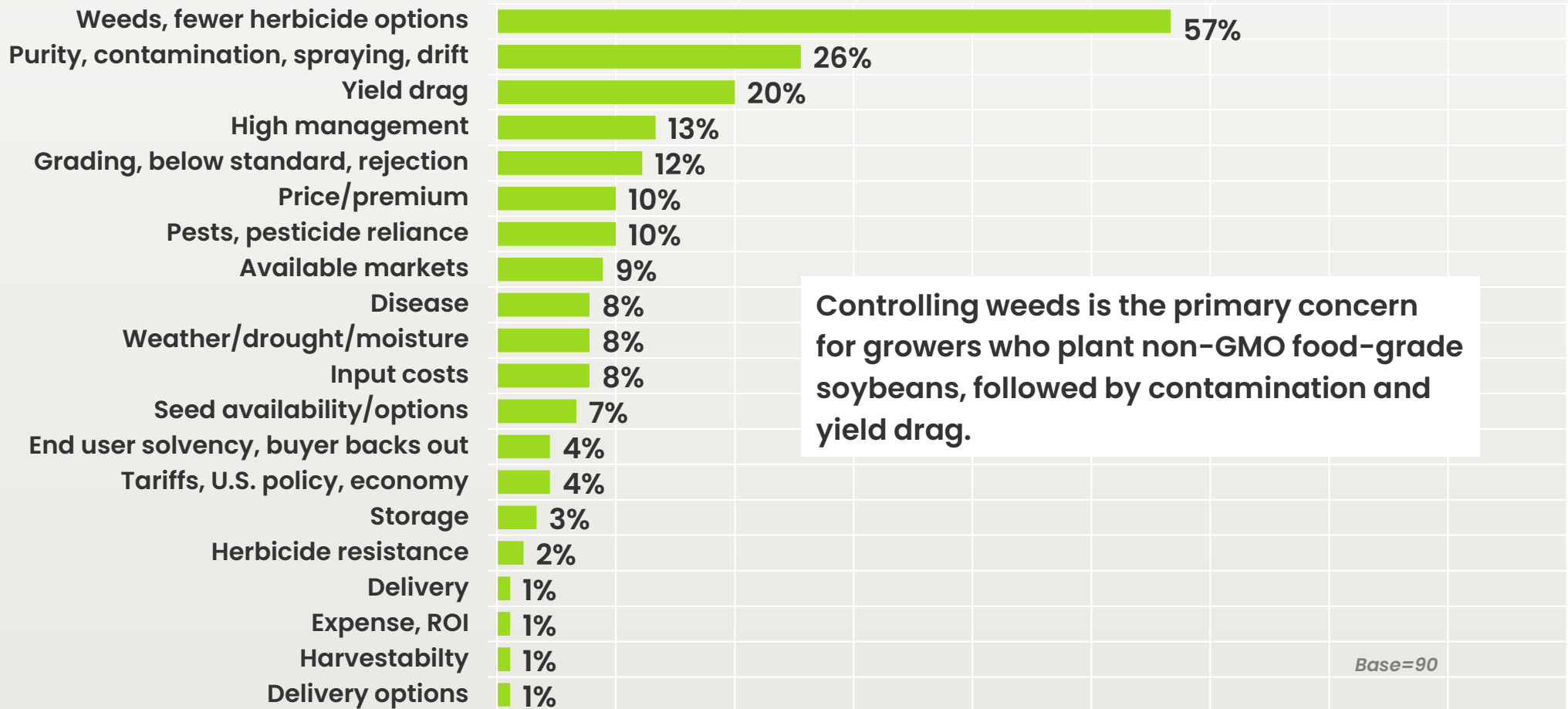
Base=125, more base=43, less base=29..

A net of 11% of growers report that non-GMO soybeans cost about \$4.71 more on average per acre to produce than GMO soybeans.

Growers who report that non-GMO soybean production costs are higher (37%) contend they pay \$38.89 more on average.

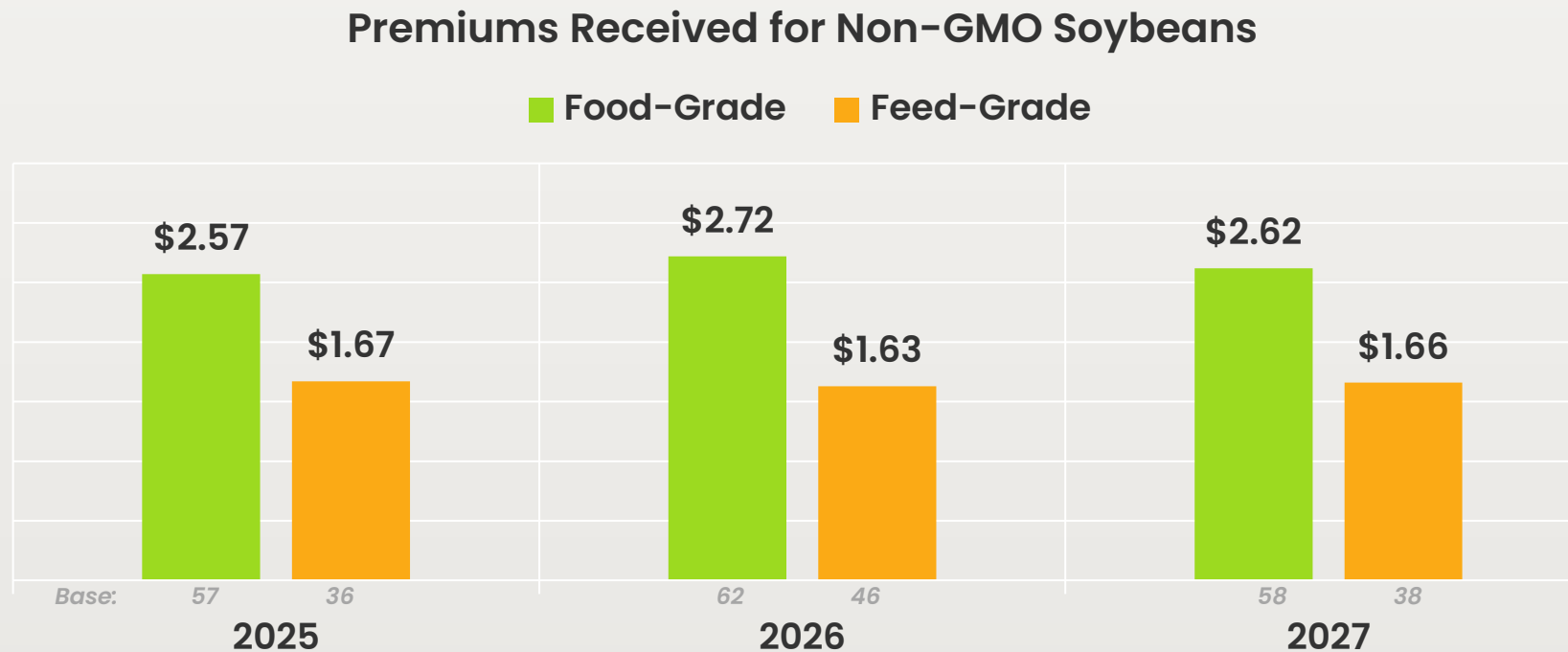
Growers who report that non-GMO soybean production costs are lower (26%) contend they pay \$45.97 less on average.

Risks Growers Associate with Non-GMO Food-Grade Soybean Production



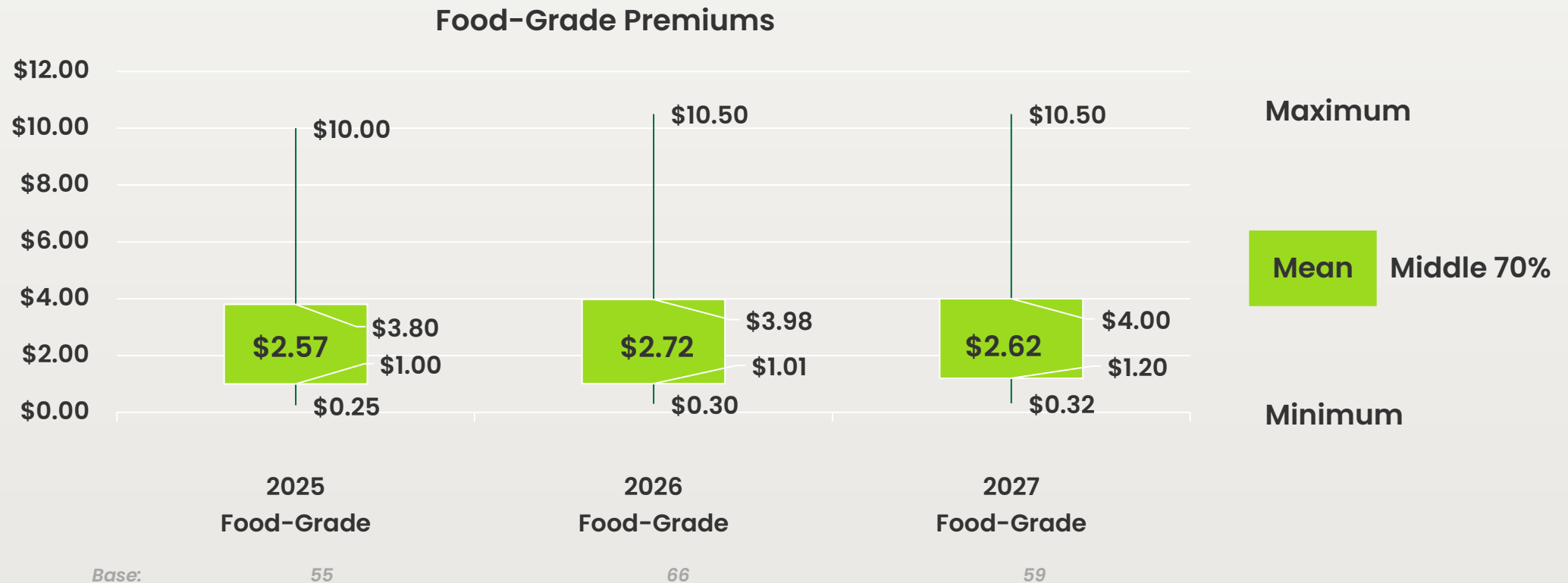
Premiums Received for Non-GMO Soybeans

Growers report receiving a \$2.57 premium in 2025 for non-GMO food-grade soybeans. This figure is expected to increase by 6% this year to \$2.72. Non-GMO feed-grade soybean premiums are expected to decrease by 2% in 2026, from \$1.67 to \$1.63. Growers expect non-GMO food-grade premiums to decrease by about 4% in 2027 and feed-grade premiums to be roughly the same.



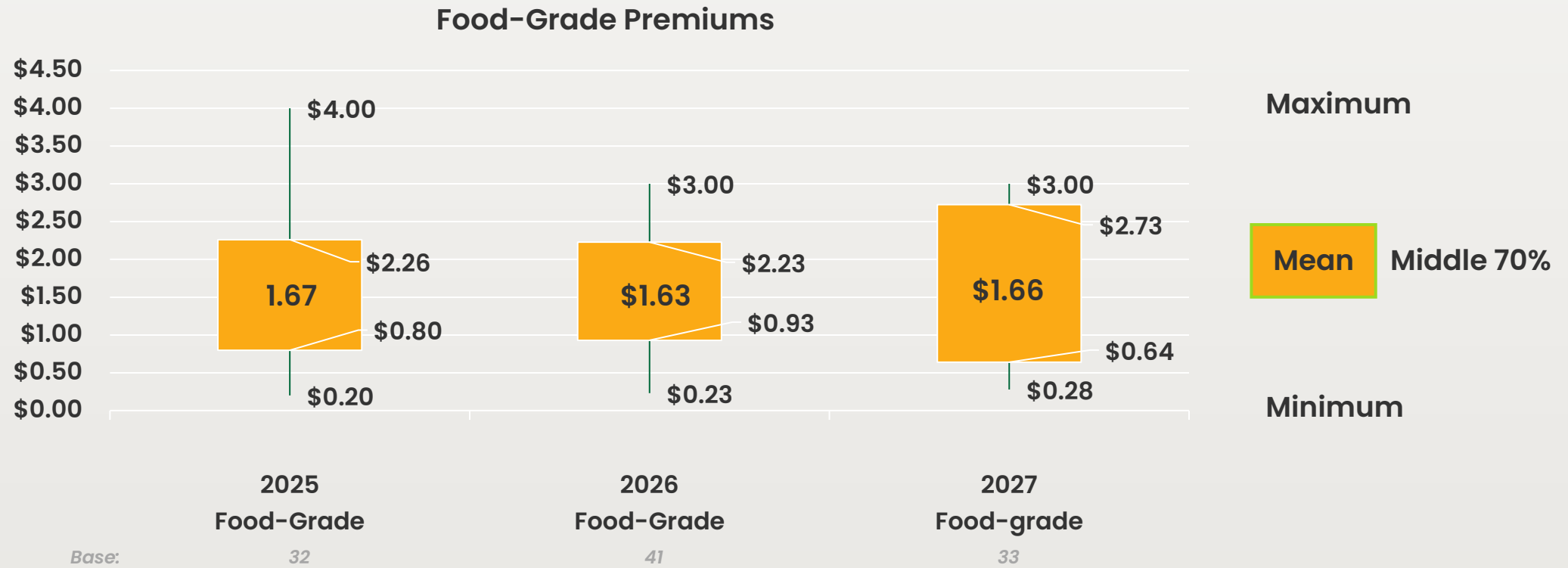
Premiums Received for Non-GMO Food-Grade Soybeans

Most growers (70%) report receiving between \$1.00 and \$4.00 for non-GMO food-grade soybeans, with lows of less than \$0.50 and highs of \$10.00. Half of the growers reported receiving more than \$2.00 in 2025.



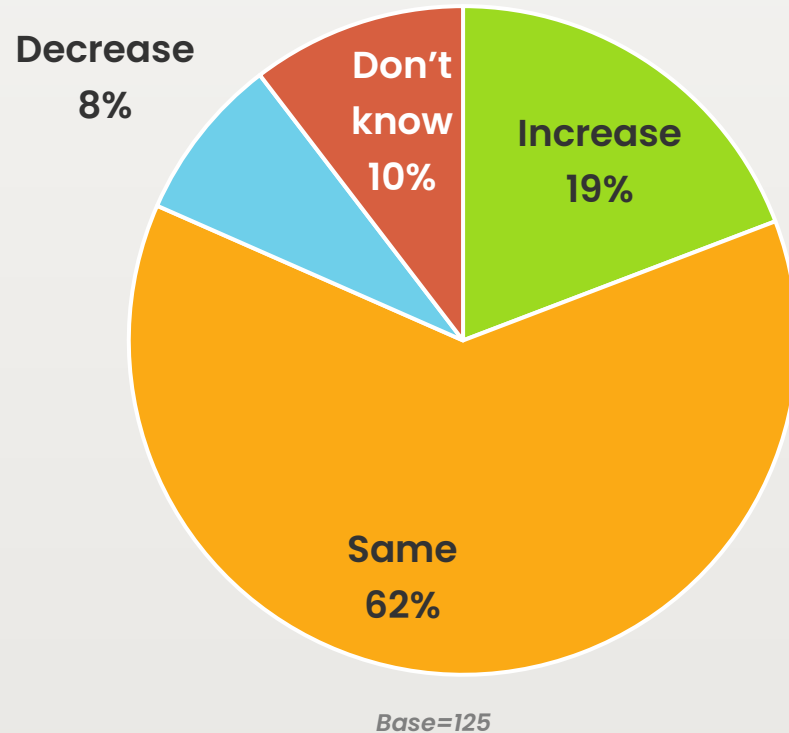
Premiums Received for Non-GMO Feed-Grade Soybeans

Most growers (70%) report receiving between \$0.80 and \$2.30 for non-GMO food-grade soybeans, with lows of less than \$0.30 and highs of \$4.00.



Anticipated Change in Non-GMO Food-Grade Soybean Production

Change in Food-Grade Soybean Production Over Next Couple of Years

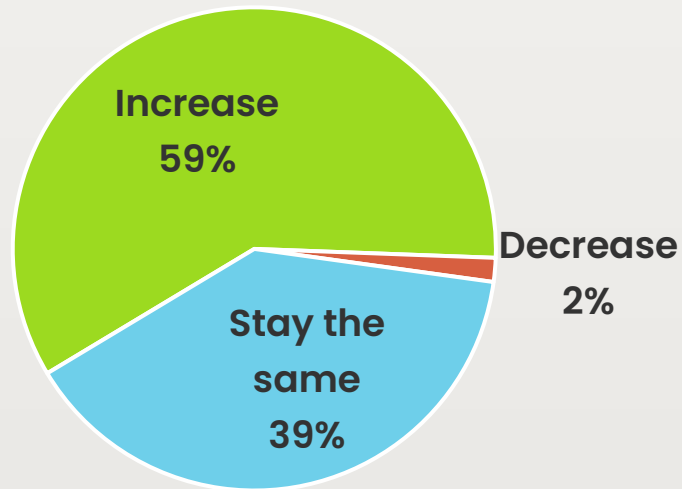


- Most growers of non-GMO soybeans report they will not change their current production (62%).
- Growers are more likely to increase rather than decrease acres by a margin of more than 2 to 1.
- The primary incentive to increase food-grade acres is profitability. One grower explains, *My primary reason is because of the premium price. It gives higher income per acre.*
- In contrast, growers are likely to decrease food-grade acres due to difficulty in controlling weeds and available markets, as one grower contends, *Weed control is too difficult.*

Anticipated 2027 Non-GMO Soybean Input Costs

Most growers expect input costs for non-GMO soybeans to increase in 2027 (59%) and have a “wait and see” approach before determining if it will impact their non-GMO soybean acres. One grower expresses, *Cost of inputs is definitely an important factor to consider in my operation, and if the cost gets too high, I’ll reduce my production of non-GMO soybeans in 2027.* Roughly one-third of growers (36%) express that input costs will have little to no impact on their decisions, as one grower explains, *Not likely to have much effect because input costs increase on GMO also.*

Anticipated Input Costs
(Growers)



Base=125.

	Total	Increase	Same
Little to no impact	36%	25%	58%
Depends on production costs	15%	14%	15%
Depends on ROI, profitability	9%	10%	8%
Contingent on premium	8%	13%	0%
Monitoring	8%	12%	3%
Negative impact, plant same or less	7%	9%	3%
Depends on economy	3%	3%	3%
Need more yield	2%	3%	0%
Depends on available markets	2%	3%	0%
Positive impact, plant more/continue	1%	1%	0%
Depends on consumer demand	1%	1%	0%

Base: 111 69 40

Production of Other Value-Added Crops

About 49% of non-GMO soybean producers plant at least one other value-added crop, mostly corn (77%). Almost all growers report they will receive a premium for other value-added crops they plant. The exceptions are alfalfa and hay with value-added traits, where only 50% and 40% report they will receive a premium, respectively.

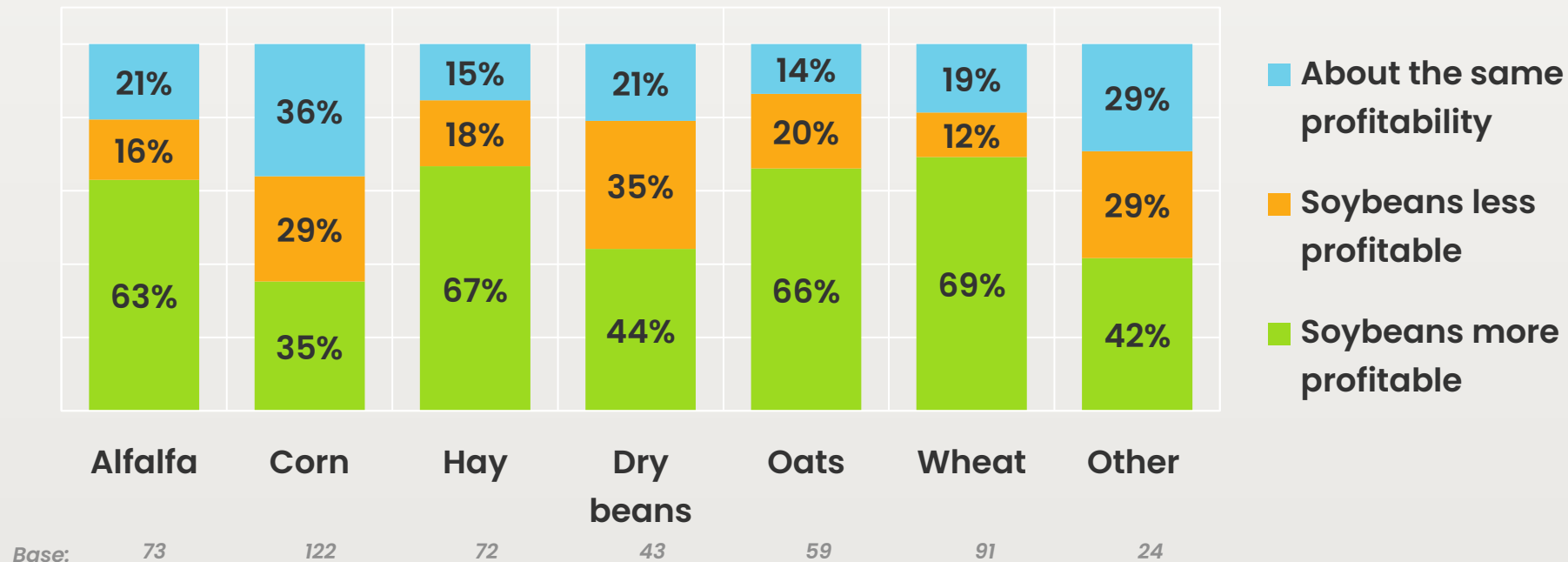
Other Crops Planted in 2026

Crops	Any Crops	Conventional Crops		Value-Added Crops			Bases		
	% of Growers	% of Growers	Average Acres Planted	% of Growers	Average Acres Planted	% that Will Receive Premium	% of Growers	Value-Added Acres/Premium	Conventional Acres
Alfalfa	23%	14%	146.2	16%	255.6	50%	29	18	20
Corn	95%	43%	780.0	77%	351.5	78%	118	54	96
Hay	27%	12%	181.5	21%	113.5	40%	33	15	26
Dry beans	7%	5%	227.8	5%	168.9	83%	9	6	6
Oats	14%	9%	230.1	10%	180.4	82%	17	11	12
Wheat	43%	17%	394.3	34%	202.3	81%	53	21	42
Other	7%	2%	146.2	6%	255.6	100%	9	3	7

Relative Profitability of Soybeans Compared to Other Crops

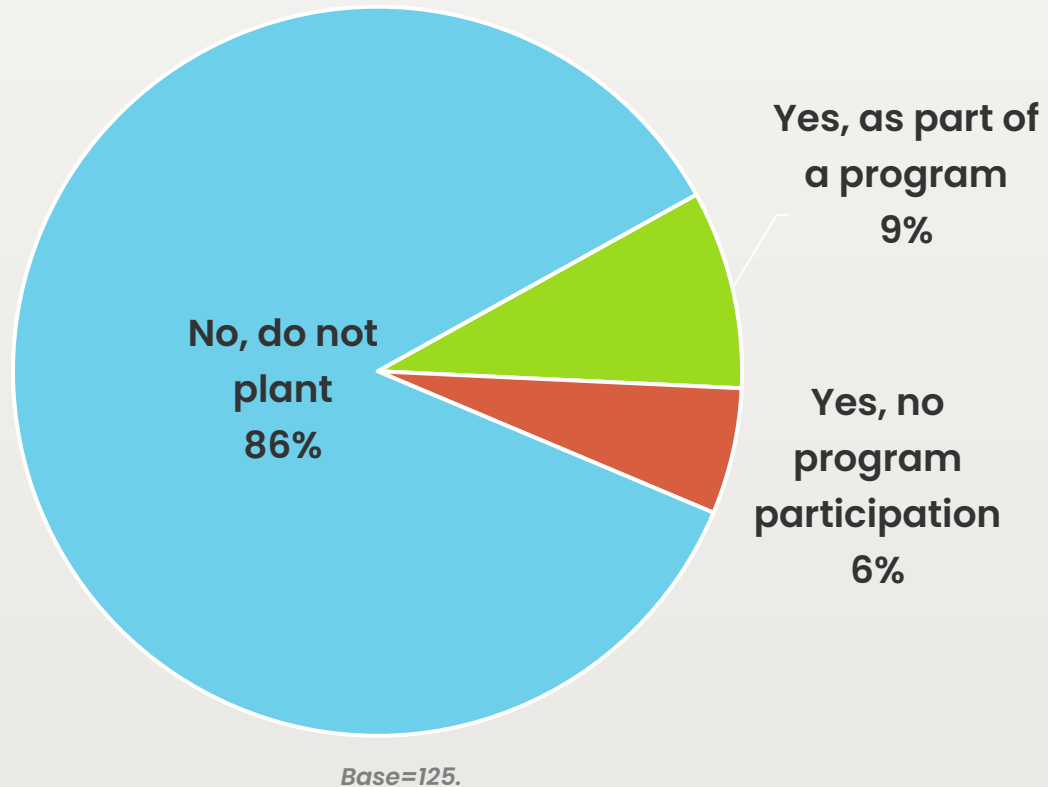
Most non-GMO soybean producers indicate soybeans are more profitable than other crops, excluding corn and dry beans.

How Profits from Soybeans Compare to Profits from Other Crops



High Oleic Soybeans

Plant High Oleic Soybeans

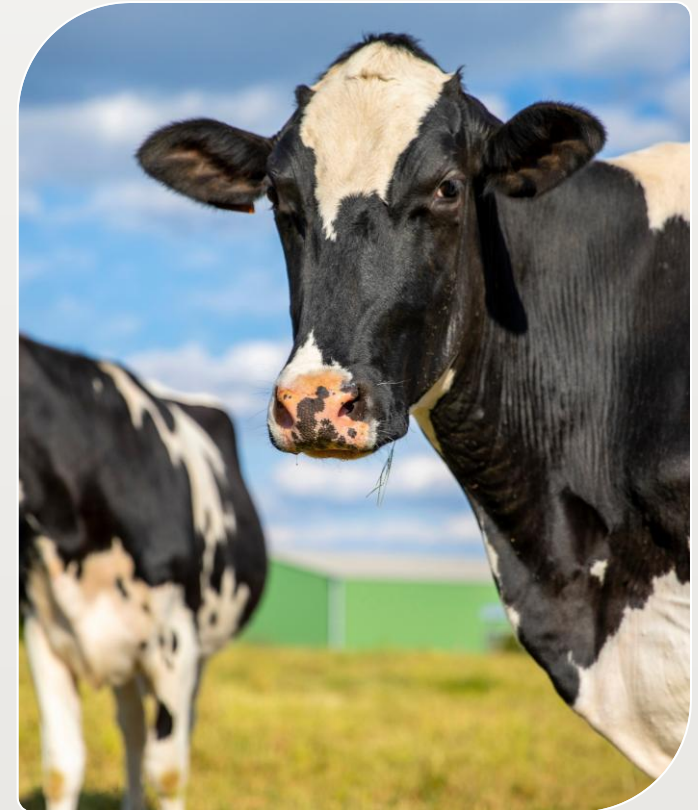
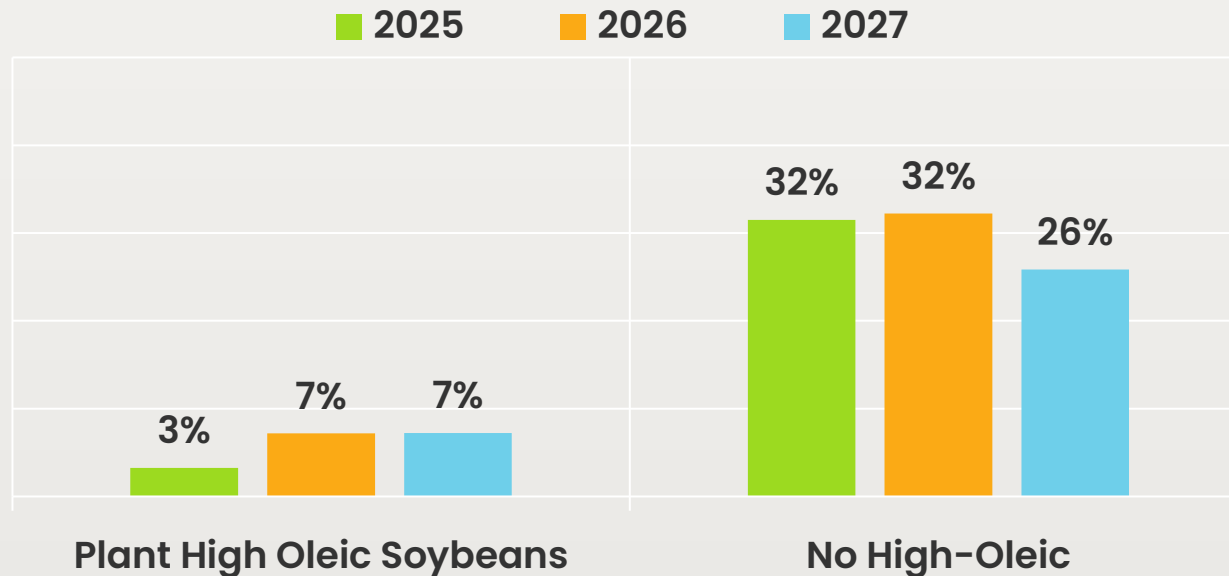


Few growers currently plant high oleic soybeans (14%). Among those who do, about 61% participate in programs to do so.

High Oleic Non-GMO Feed-Grade Soybeans

Growers who planted high oleic soybeans doubled their non-GMO feed-grade soybean acres between 2025 and 2026, probably to meet demand in the dairy cattle markets.

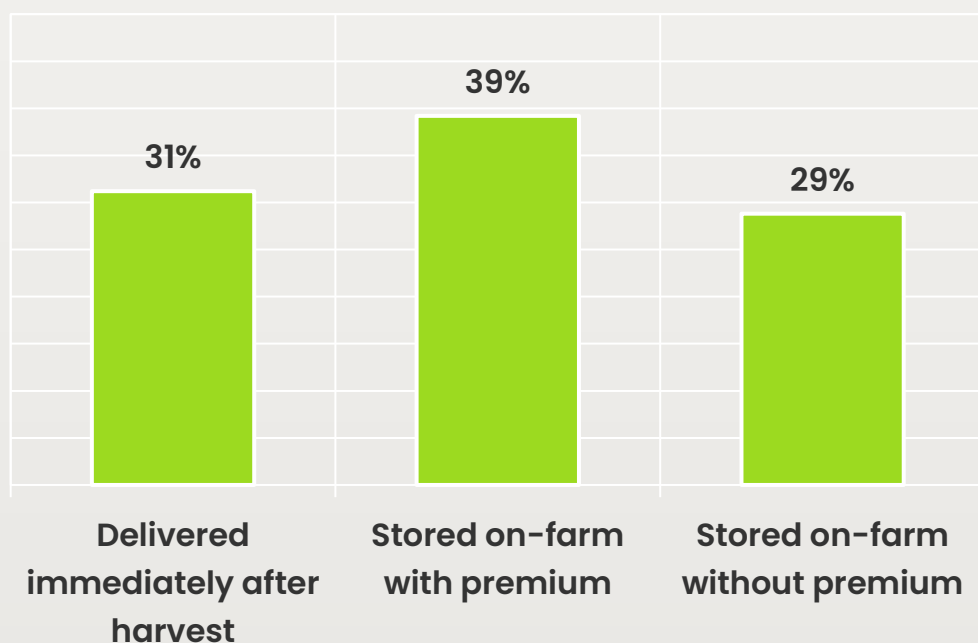
Portion of Non-GMO Soybeans That Are Feed-Grade



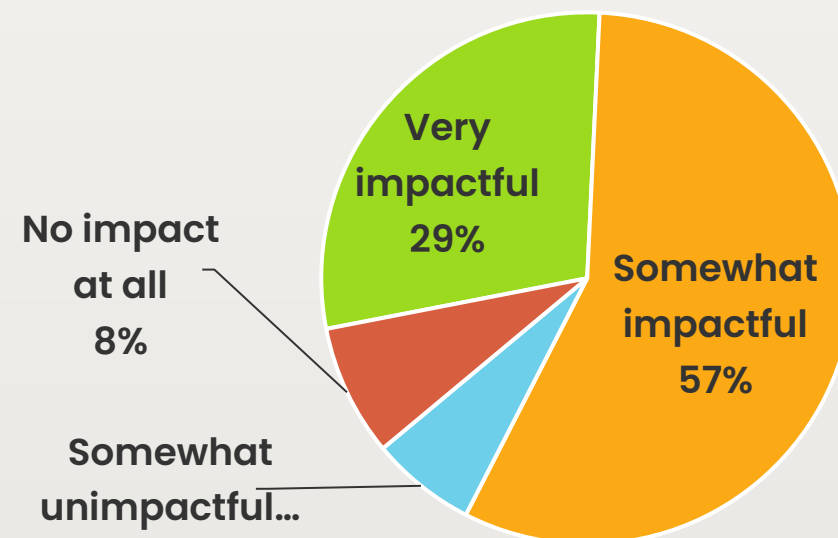
Delivery and Storage of Value-Added Crops

Growers generally store value-added crops on the farm until the delivery date (68%), and most receive an additional storage premium (58%). Growers expressed that on-farm storage is an important consideration in planting value-added crops, with 85% reporting that it is very (29%) or somewhat (57%) impactful on their decision.

% of Growers



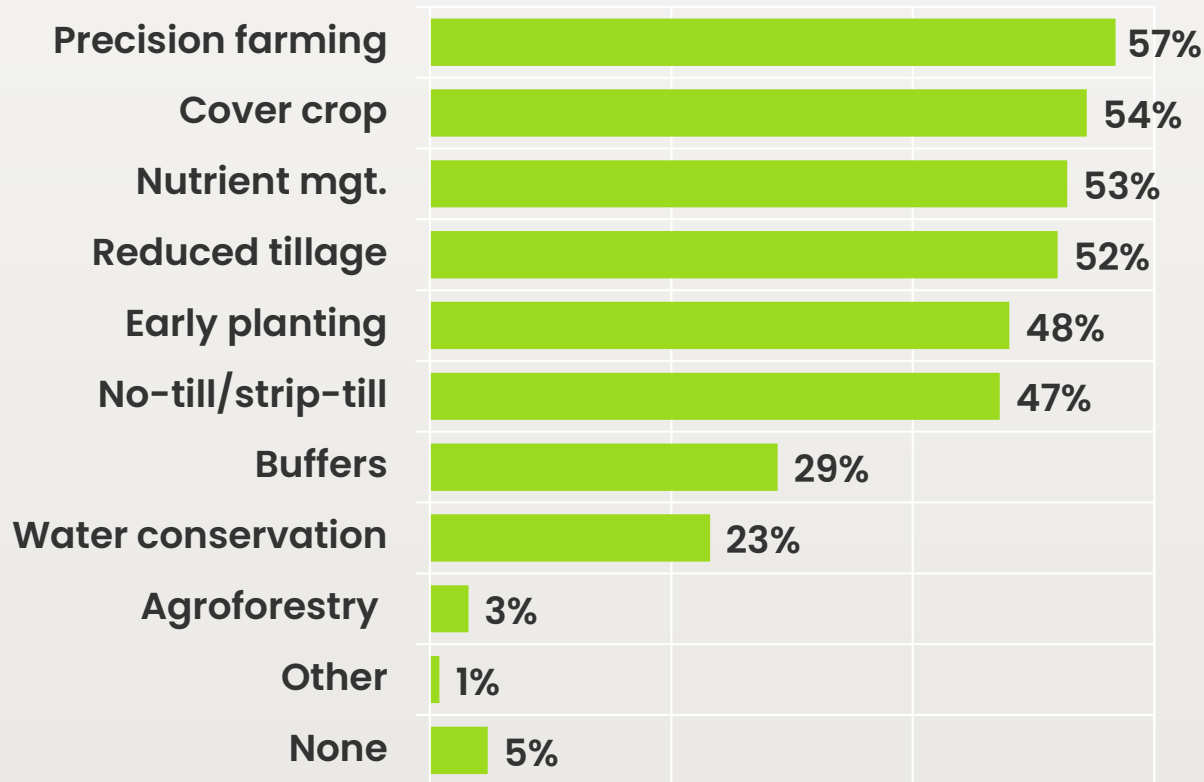
Impact of On-Farm Storage on Decision to Plant Value-Added Crops



Base=125.

Participation in Sustainability Practices

Types of Sustainability Practices Growers Employ



Base=125

- Most non-GMO soybean producers (95%) participate in sustainability practices.
- Growers report that profitability and agronomic performance are the rewards for using these practices (57%). About 46% of growers participated in government-funded or private-funded programs to use sustainable practices.

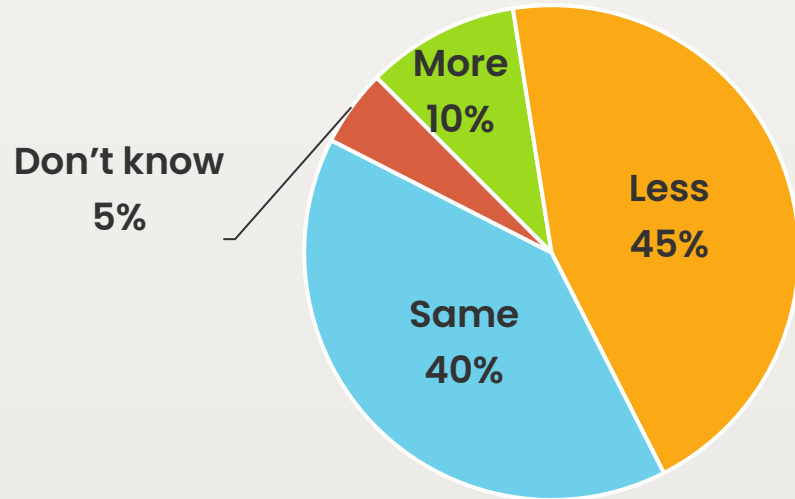
Incentive to Use Sustainability	% of Growers
Performance	58%
Profitability/cost reduction	46%
Agronomic performance	37%
Sustainability Programs	46%
Government program	37%
Private company program	16%
None/not applicable	22%

A collage of various soy products arranged on a wooden surface. In the center is a glass of white soy milk. To the left is a plate of golden-brown fried soybean fritters. In the foreground left is a wooden tray filled with bright green edamame pods. To the right of the milk is a clear glass bowl overflowing with yellow soybeans, with more beans scattered on the table in front of it. In the background right are several blocks of white tofu, some whole and some cut into smaller pieces. A small white ceramic dish containing a dark liquid is in the bottom right corner.

Findings from Purchasers

Change in Non-GMO Soybean Purchases

Perceptions of Buyers Non-GMO Soybean Purchases in 2026



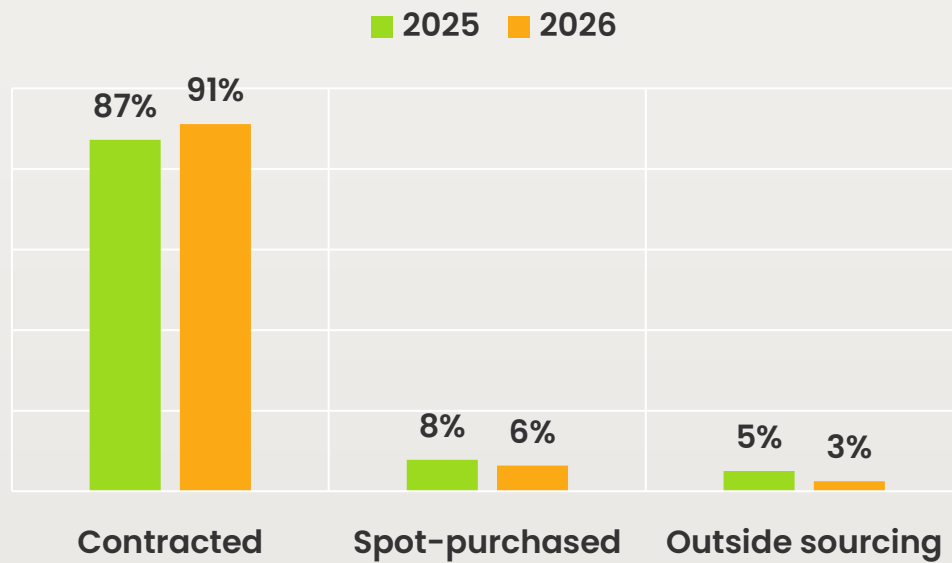
Purchasers believe buyers purchased the same (40%) or fewer (45%) non-GMO soybeans in 2026.

Reasons why non-GMO soybean purchases were lower in 2026 than in 2025 include:

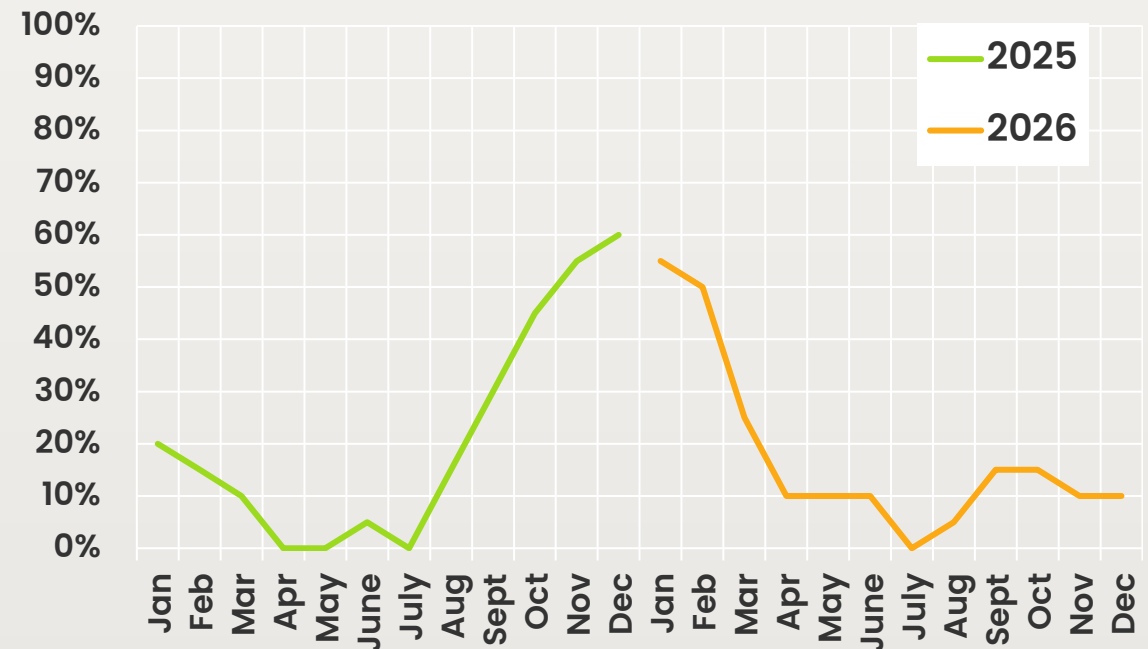
- Lower consumer demand due to economic factors, as one purchaser states, *Demand is significantly lower on non-GMO soybeans in the food space due to economic factors. Middle-class consumers are the target market and are purchasing less premium products at the grocery store.*

How Non-GMO Food-Grade Soybeans Are Acquired and When Purchase Decisions Are Made

Average % of Purchased Non-GMO Food-Grade Soybeans



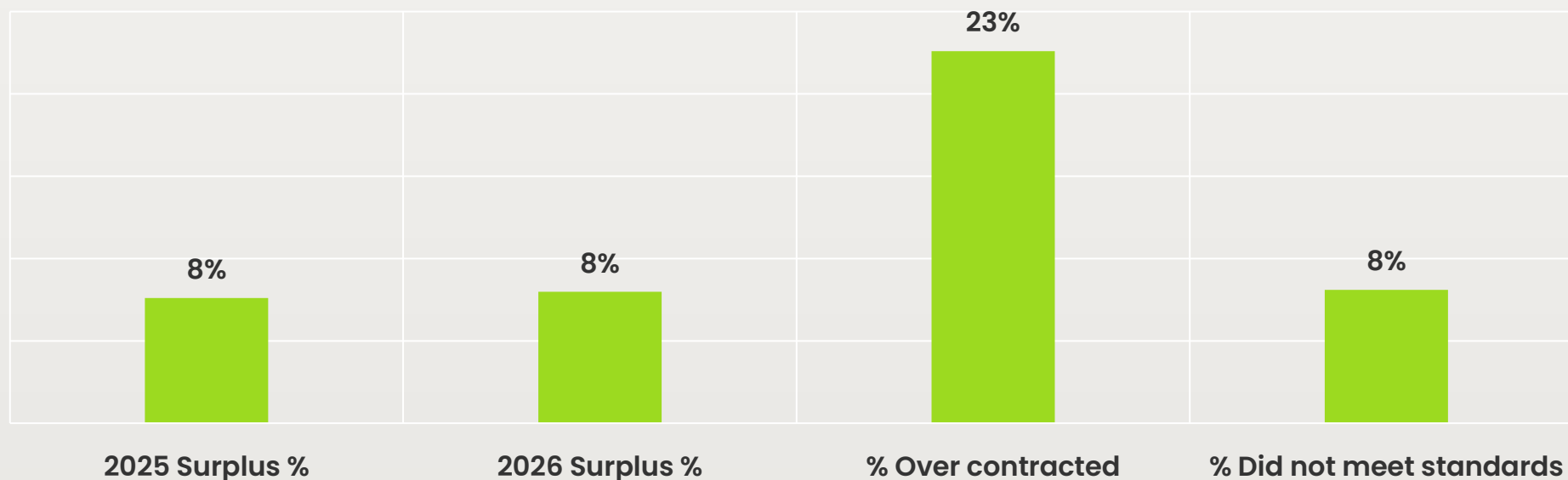
When Purchase Decisions Made



Surplus Non-GMO Food-Grade Soybeans

Purchasers contract for about 23% more food-grade soybeans than they expect to sell. It is worth noting that one purchaser reported contracting 80% more food-grade soybeans than they expected to sell. When this outlier is removed, the over-contracted percentage is 16%. They usually end with a surplus of about 8% from over-contracting, and another 8% surplus from non-GMO food-grade soybeans that do not meet quality standards.

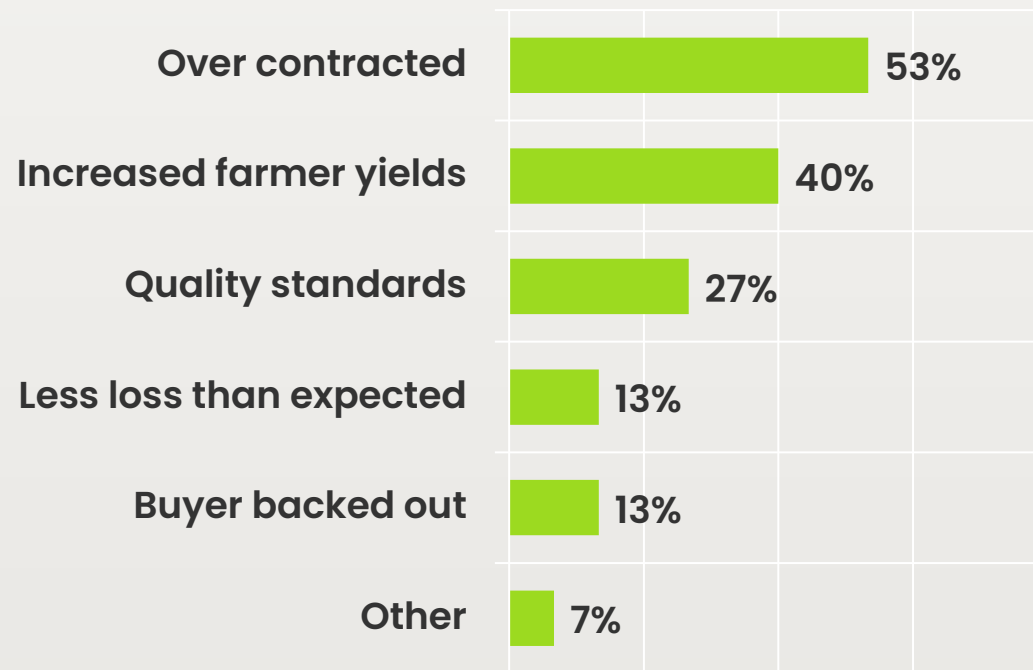
Average % of Non-GMO Food-Grade Soybeans Purchased



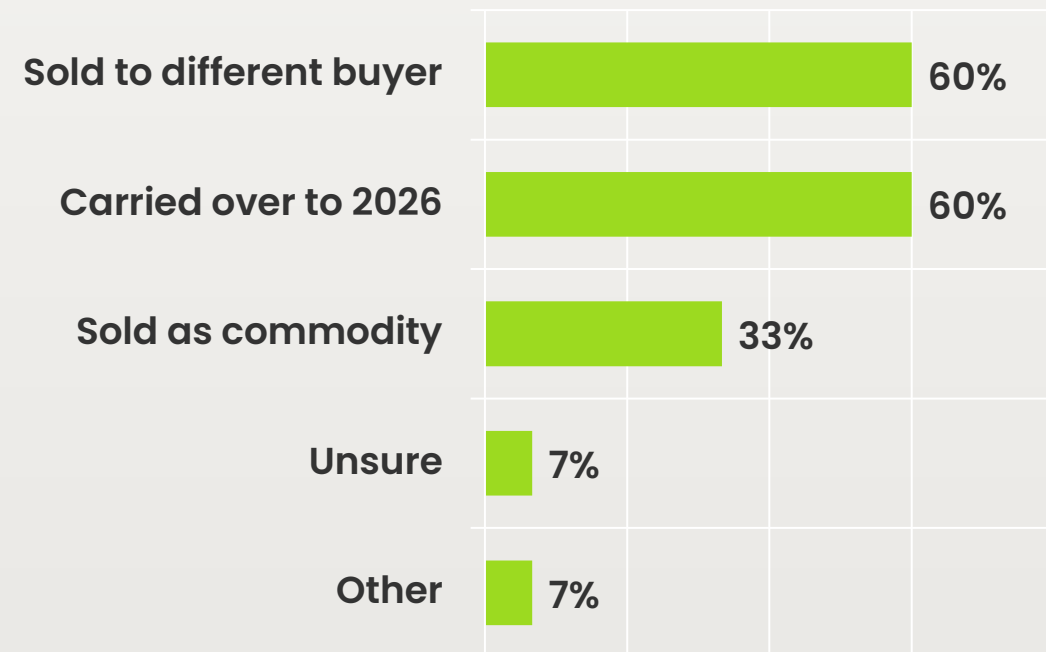
Reasons for Surplus and How Surplus is Handled

Most non-GMO food-grade soybean surplus is due to over-contracting and better-than-expected yields. Purchasers either look for another buyer or hold the surplus for the following crop year.

Reason for 2025 Surplus

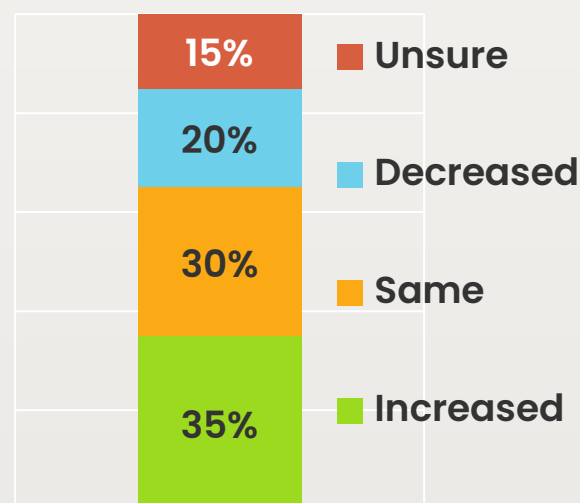


2025 Surplus Destination

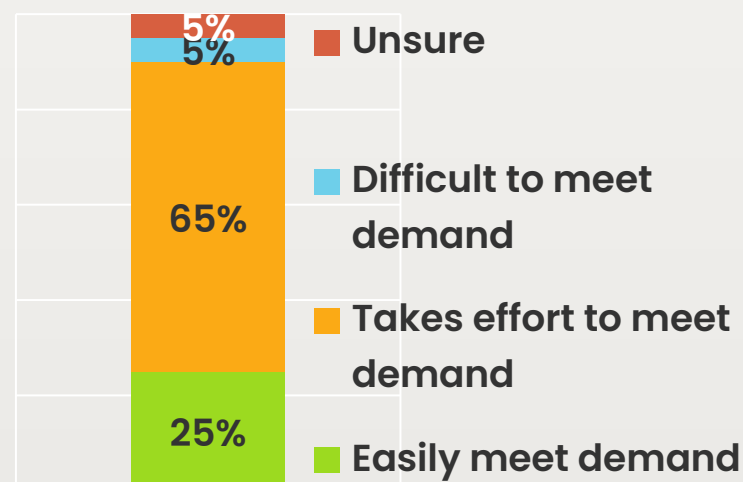


Demand and Supply

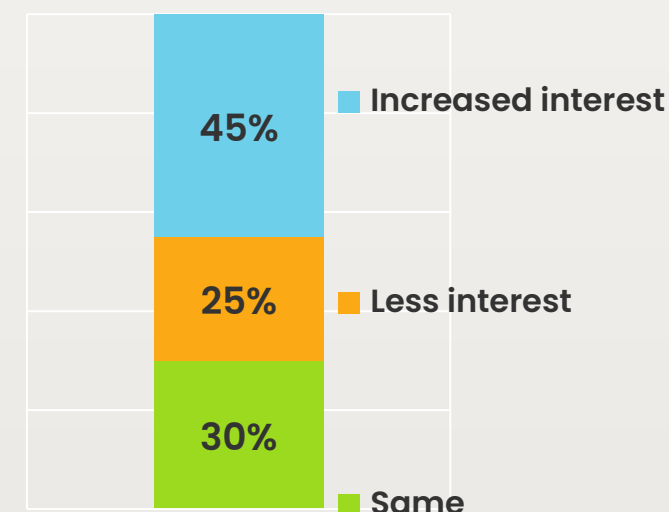
Purchasers skew toward an increase in upstream demand for non-GMO food-grade soybeans, even though results suggest some uncertainty. While most purchasers report it takes some effort to meet demand (65%), they expect to meet 92% of demand in 2026. This was also true in 2025. Furthermore, purchasers are noticing increased interest among growers in producing non-GMO, food-grade soybeans. Taken together, results suggest an increase in non-GMO food-grade soybean supply from U.S. growers.



Upstream
Demand



Supply
Availability

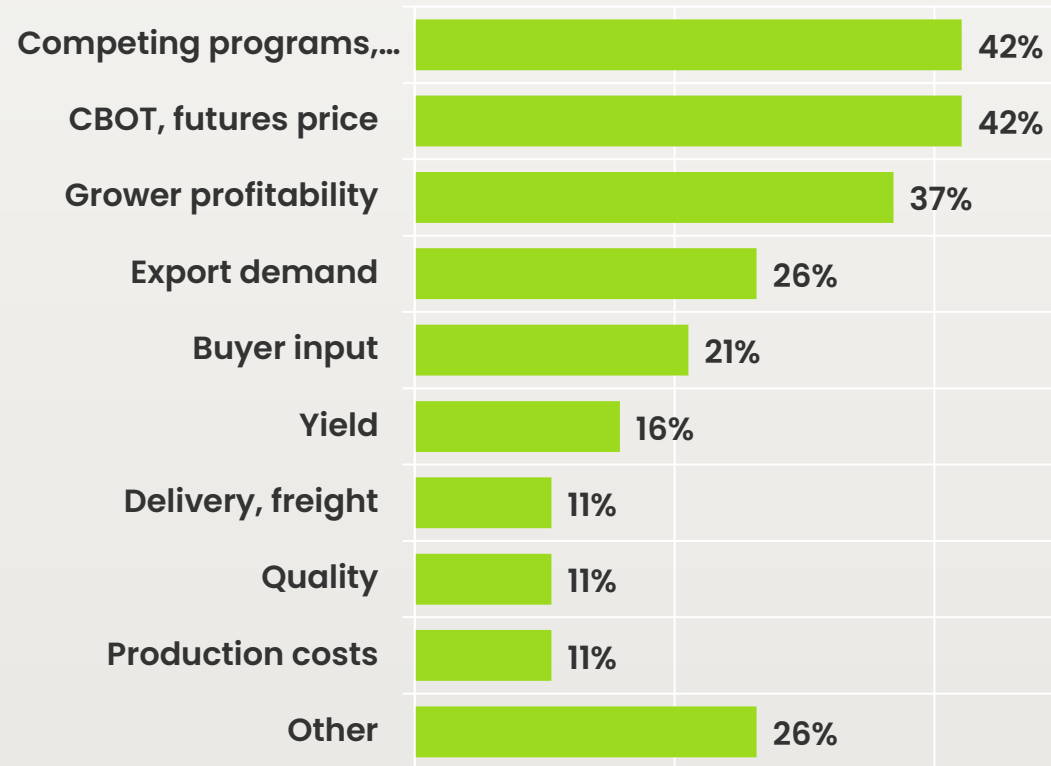


Grower Interest
Compared to 2025

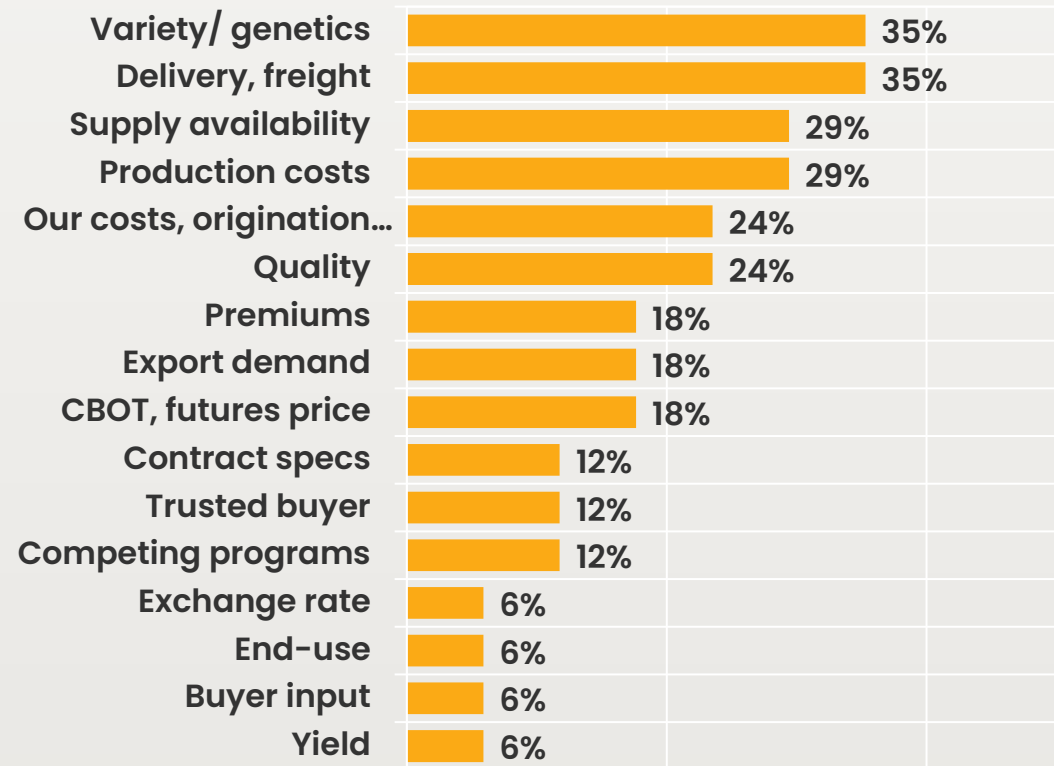
Criteria to Determine Premiums

The top criteria used to determine premiums to growers are competitive premiums/programs, commodity prices and grower profitability. The top criteria used to determine premiums to buyers are genetics, freight, available supply and production costs.

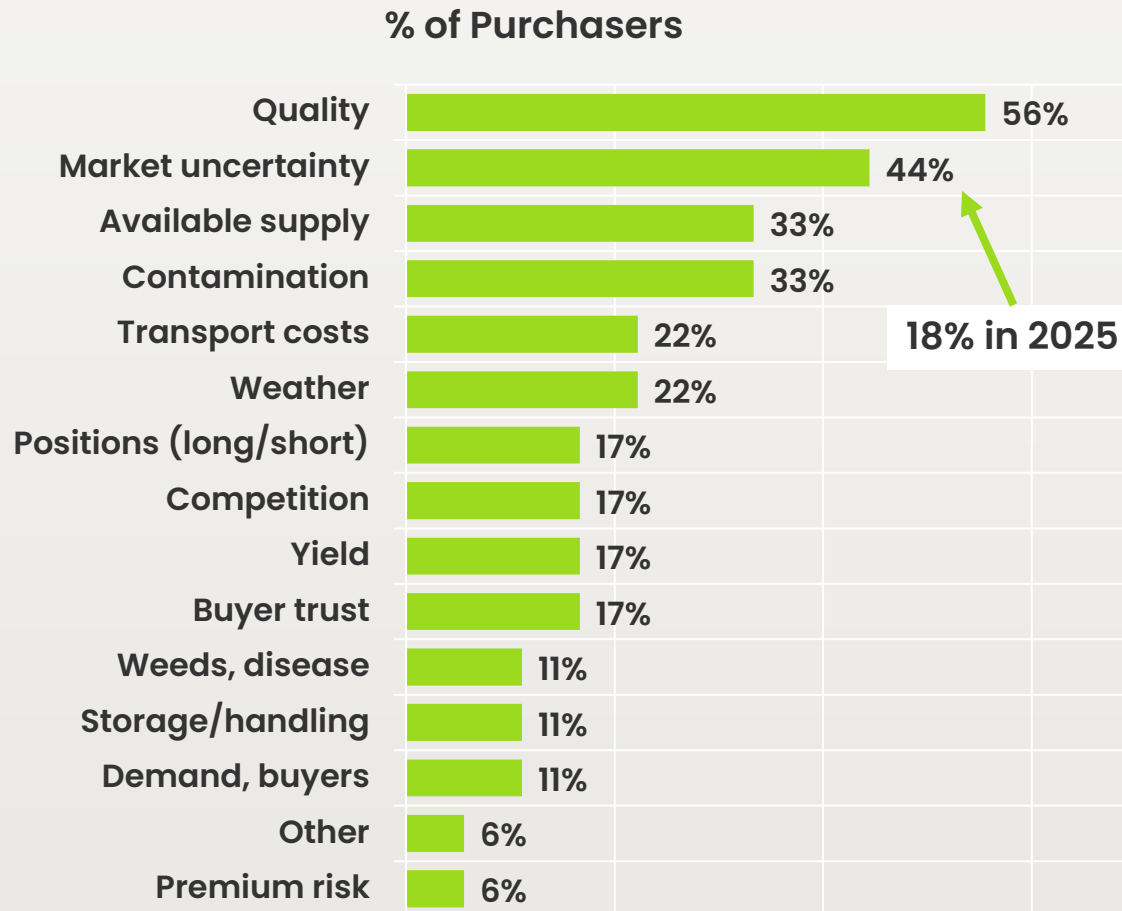
Criteria to Determine Premium to Growers



Criteria to Determine Premium to Buyers



Risks Associated with Purchasing Non-GMO Food-Grade Soybeans



Meeting quality standards is the top risk purchasers incur in purchasing non-GMO food-grade soybeans. One purchaser reports they mitigate this risk *by working closely with our growers and extension specialists to improve agronomics, weed control, purity and overall production practices for identity-preserved food-grade soybeans. We also use strict quality testing, traceability systems, production contracts and dedicated handling procedures to help ensure consistent supply, maintain non-GMO integrity and meet buyer specifications.*

Market uncertainty is more of a risk this year than in 2025. Purchasers report having a diversified portfolio, insurance and hedging to mitigate this risk.

