



# Policy Developments Around Food Ingredient Safety and Labeling: Consumer Insights

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**FoodSafety**  
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# The last 25 years shaped how consumers eat & drink today

Today's eating behaviors are the result of 25 years of compounding cultural, technological, health, and policy forces – **not a single trend.**

2000-2007



## Information & Restriction

Digital nutrition access expands • Growing attention on trans fat & low-carb • FDA labeling grows • Functional foods emerge

**Result:** Consumers actively managing food through rules and avoidance

2008-2014



## Technology Meets Lifestyle

Recession reshapes priorities • Social media enters food culture • Smartphones change food discovery • Natural & farm-to-table grow • Influencers emerge

**Result:** Eating becomes social, cultural, and identity-driven

2015-2019



## Values & Personalization

Sugar reduction focus • Ethics & sourcing expectations rise • Plant-based goes mainstream • Personalized nutrition accelerates

**Result:** Food reflects personal values *and* individual needs

2020-2022



## Health as Agency

Pandemic elevates health awareness • Food used for protection & prevention • Social platforms act as health educators

**Result:** Consumers take control of health decisions outside traditional systems

2023-2026



## Intervention & Reset

GLP-1 weight-loss acceleration • Viral health trends drive intentionality • Policy-led health education expands • New food pyramid resets guidance

**Result:** Medical, digital, and policy forces converge to reshape eating behavior

# Health-minded consumers account for ~40% of food and beverage sales

## Food & Beverage Spending Power of Healthy Consumers

**\$402B**

In food & beverage retail sales

**+2%**  
vs. YA

**\$306B**

in commercial and non-commercial foodservice

**+8%**  
vs. YA

**\$708B**

of total food & beverage spend

**+5%**  
vs. YA



Although much of food and beverage can be considered as part of consumers' well-being journey, our analysis is focused on consumers who prioritize wellness on a regular basis.

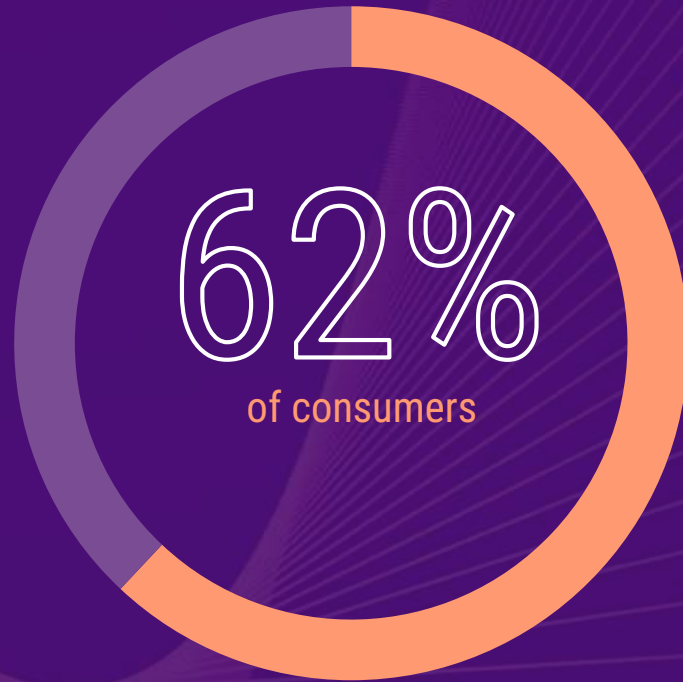
# Healthy F&B consumers seek fresh food and pay more attention to what's in their food

## Healthy F&B Consumers' Attitudes and Behaviors

- Actively try to improve eating habits, follow a healthy and balanced diet, and seek information on nutrition/healthy eating
- Exercise/be active at least 20 minutes a day
- Prefer food that is fresh and offers nutritional benefits; avoid processed
- Look for foods high in protein and fiber
- Consider fruit/vegetable servings in meal selection and calorie/sugar/sodium/fat content in beverages in snacks
- With age, increase focus on wellness to stay healthy/disease-free, more closely watch portions and snack less
- Prioritize wellness goals over price, value, convenience, brand, etc., in F&B choices



# More consumers are paying attention to labels

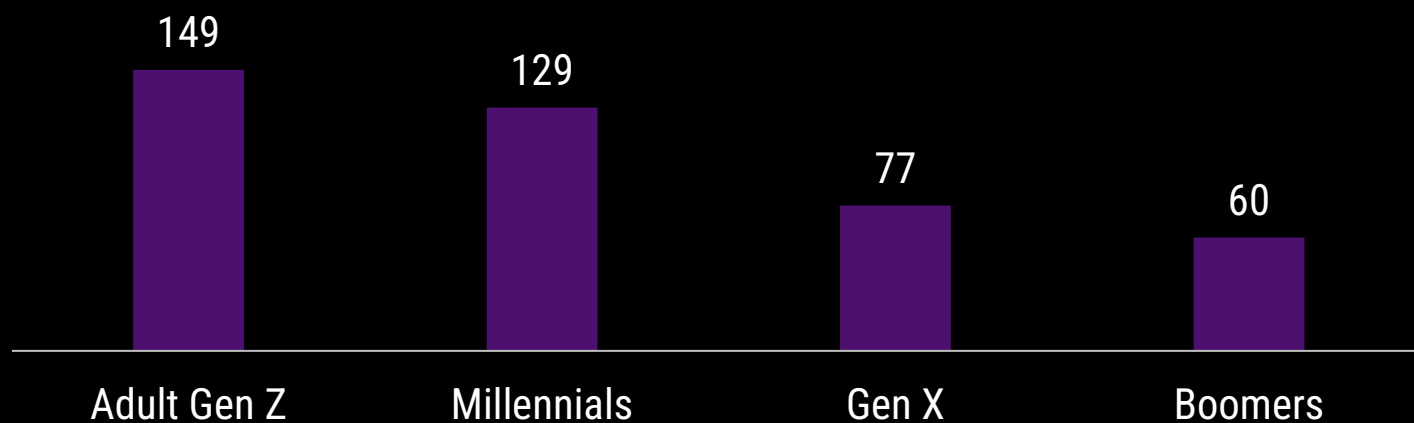


*Agree or strongly agree that when shopping for groceries, I pay attention to ingredients/nutritional labels*

**Millennials** are most likely to say they pay attention to labels

# Younger consumers are more likely to engage in a “clean eating” nutrition plan

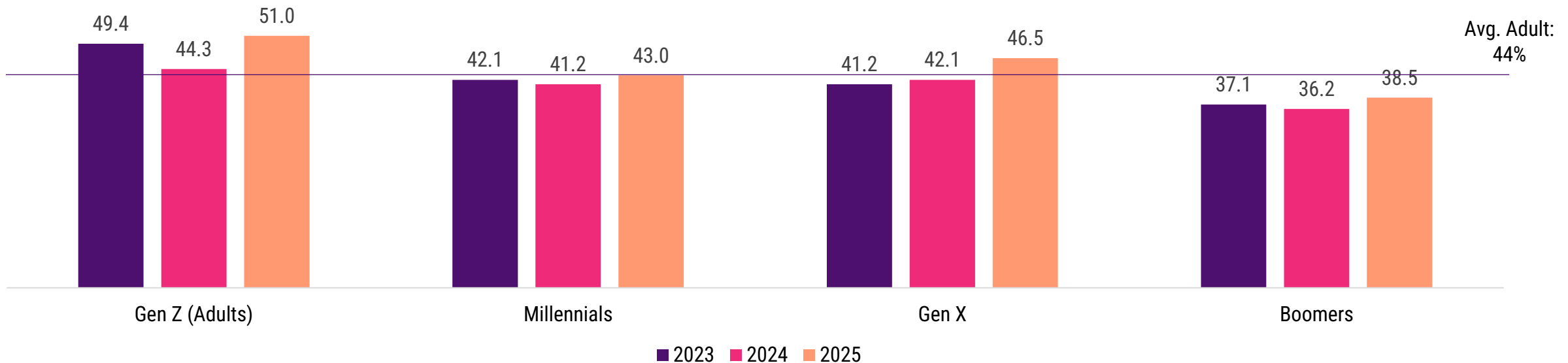
Index to Total Adults Currently on a Clean Eating Nutrition Plan



# In fact, Gen Z is leading a generational push toward higher protein consumption

Opportunities exist to meet both the growing demands of younger and midlife consumers while continuing to educate mature consumers about protein benefits such as preventing muscle atrophy.

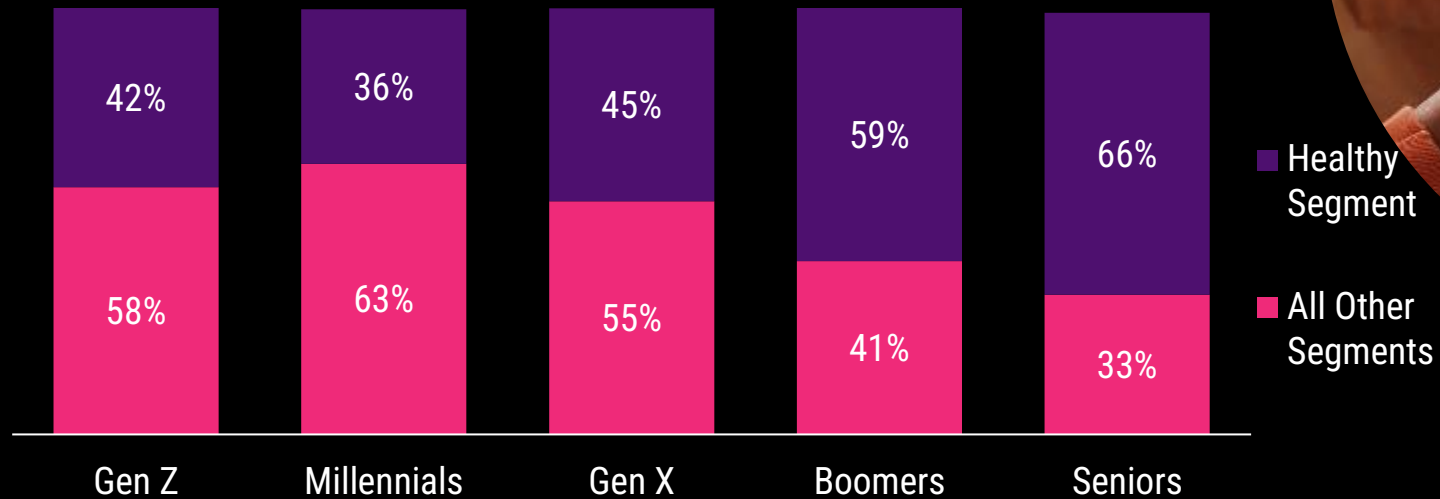
Percent of Adults Trying to Get More Protein in their Diets



# Organic foods are popular with older healthy consumers



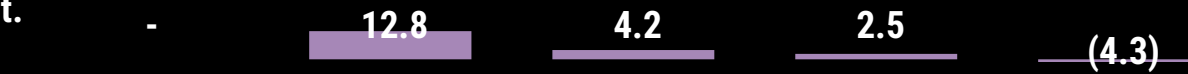
**2025  
Organic Claim  
Dollar Share**



**Total Organics  
Ppt. Chg. vs. YA**



**Healthy Segment  
Organics Spend Ppt.  
Chg. vs. YA**



# Top indexing claims show generational divides on personal needs and purchases



## Prebiotic/ Probiotic Claims

Gen Z	114
Millennials	139
Gen X	92
Boomers	74



## High/More/Source of Calcium Claims

Gen Z	86
Millennials	112
Gen X	101
Boomers	92



## Energy Claims

Gen Z	114
Millennials	137
Gen X	109
Boomers	63



## Source of Protein Claims

Gen Z	88
Millennials	112
Gen X	103
Boomers	91

# Consumer wellness motivations for protein vary and span all generations



## Healthy Nutrition & Meal Replacement

Satisfy hunger & boost energy to do what I need to do, also ensuring a balanced diet

Active lifestylers



## Sports Nutrition

Seek enhanced nutrition to support & maintain my fitness and power my workouts

Fitness enthusiasts



## Women's Health

Supporting muscle maintenance, bone density (post-menopause), metabolism, and aiding in hormone balance, hair/skin, and immunity

Women of all ages



## Senior Nutrition

Support well-being and Longevity with protein-rich supplements, foods & beverages that enhance quality of life

Boomers & seniors



Products featured are top performing Nutritional Protein sub-brands that skew >120 index within the focus demographic

# More than a quarter of adults are actively trying to consume fewer artificial ingredients

% of Adults Trying to Consume Less...



Ultra-Processed  
Foods



Artificial  
Colors/Flavors



Artificial  
Sweeteners



Preservatives

# Consumers are adding supplements & hydration mixes to their foods and beverages

## Top Growing In-Home Ingredients and Additions

Rank based on pt. change in Annual Eatings per Capita vs. YA

Lactose Free Milk
Eggs
Nutritional supplement powders (e.g. creatine, greens, etc.)
Traditional coffee
Cream cheese
Relish
Coconut oil
Sports drink/hydration mix
Beef
Seasoning mix/blend
Tortillas & taco shells
Lemon juice
Cocoa powder

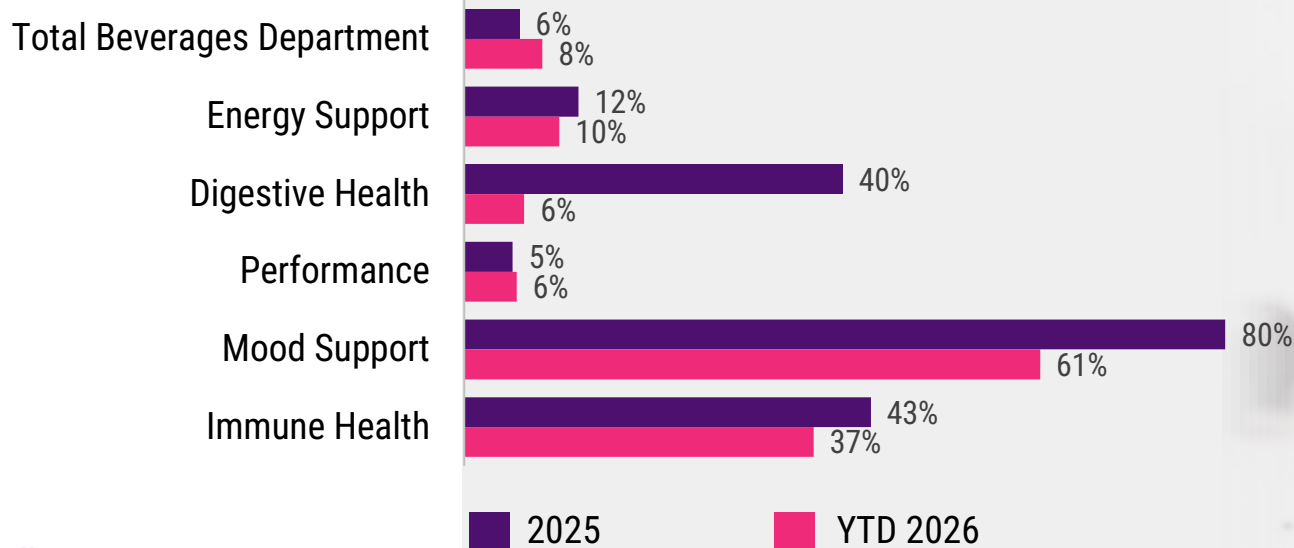


# Consumer-led benefit segmentation is key

Consumers increasingly disregard traditional beverage categories and instead select beverages based on **desired outcome**, such as immune health, mood support, digestive health, or energy.



**Functional Benefit, Total Beverages Department \$ % Chg.**



# Creatine goes mainstream:

From bodybuilding to everyday wellness

Products with creatine already over \$370M



# The next wave of functional ingredients is already on shelves



**Colostrum** supports gut barrier health and immune resilience by delivering bioactive proteins that help repair, protect, and regulate the body's first line of defense.

**Ketones** in beverages provide a clean, alternative energy source that supports sustained mental focus and physical energy without the sugar spikes or caffeine crash.

**Paraxanthine** is a compound the body naturally produces when it breaks down caffeine allowing the body get energy without the spike or crash. Many using as a caffeine alternative.

# Today, THC beverages growth is driven by Delta 9 and CBD-THC hybrids

THC beverage growth also driven largely by an increase in the number of items scanning (+285 vs. year ago) across the Convenience and MULO+ channels.

**+43%**

Quarterly Dollar Sales  
Compounded Growth  
Q1 2023 - Q1 2026

## THC Beverages by Flavor Type

	\$ Share	\$ Sales % Chg. Vs. YA
#1 FRUIT BLEND	19%	115%
#2 ORANGE	11%	270%
#3 LEMON	10%	175%
#4 PINEAPPLE	4%	135%

## THC Beverages – Circana Performance Trends



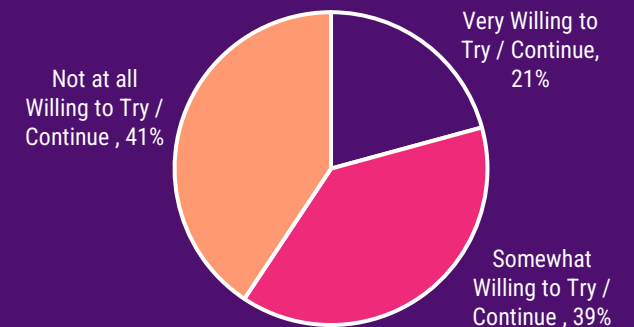
**34%** of total U.S. dollar sales driven by top 5 brands.

5 states control **54%** of total U.S. dollar sales

FL, SC, NC, WI, GA

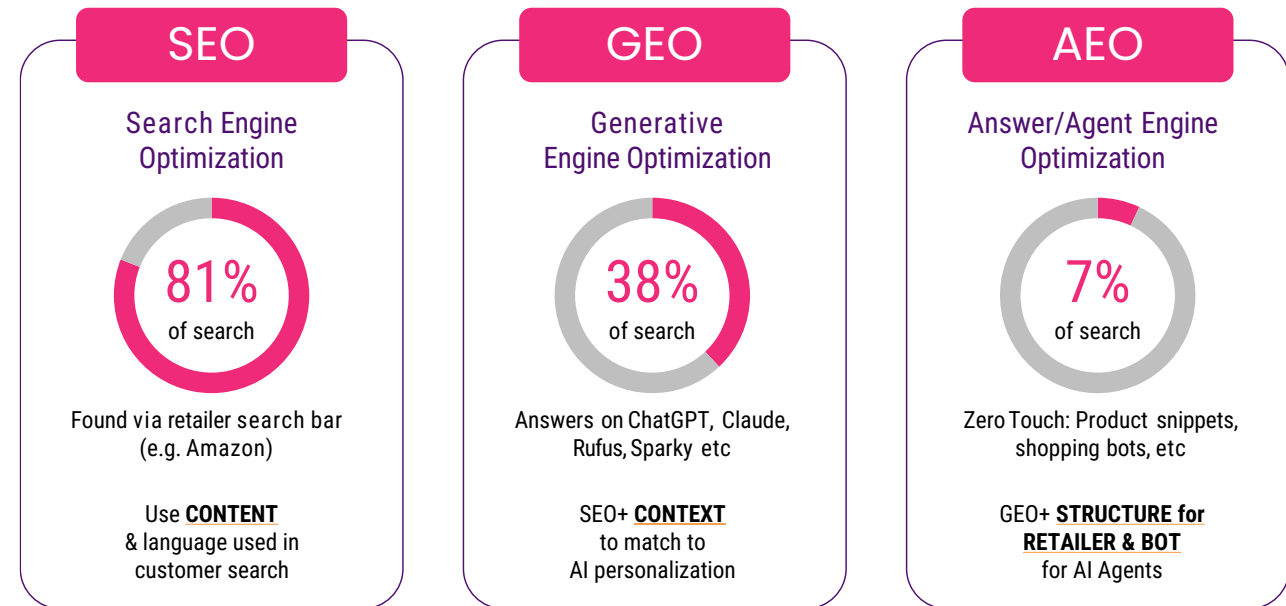


60% of Beverage Buyers report willingness to *Try or Continue* consuming THC Infused products in the next 12 months



# With AI, both transparency and functionality are critical for success

- **Consumer behavior is accelerating** – and AI is the new advisor
- **Ingredient transparency** is non-negotiable – especially when **AI is reading your labels**
- The **innovation** window is open – and **AI is accelerating discovery**
- Your move: structure for the AI era: **Brands and regulators that lead on transparency will be the ones AI recommends – not just the ones consumers find**





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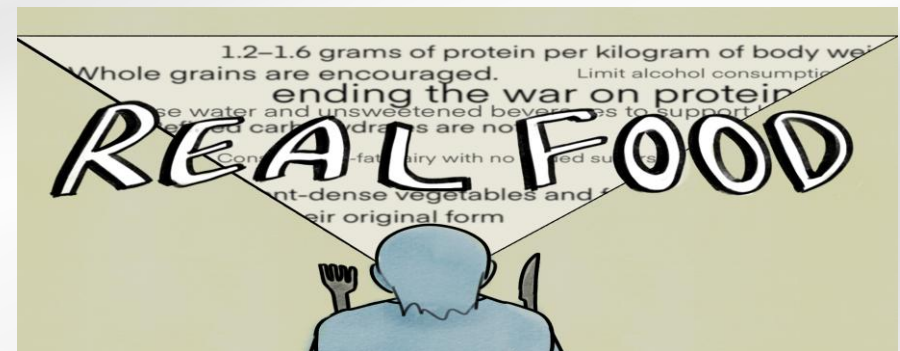
**IDFA**

**International  
Dairy Foods Association**

**Policy Developments: Food Ingredient Safety & Labelling**  
*State Legislative Activities*

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- MAHA Overview & Introduction to Key Players
- MAHA Beliefs on Food & Nutrition & Key Issues
- MAHA, Deregulation & Federal/State Policymaking
- State Food Chemical MAHA Legislative Activities





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# MAHA & Why it Matters to Food Ingredient Safety & Labelling Policymaking

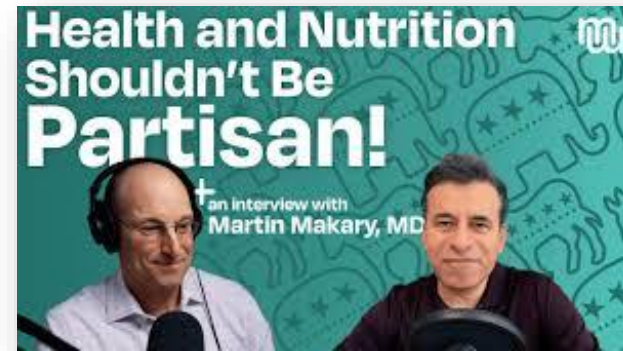
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# What is Make America Healthy Again?



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International  
Dairy Foods Association

- **MAHA Political Action Committee (PAC) formed September 2024 to advance RFK Jr. health-focused priorities; supports Donald J. Trump**
- **MAHA PAC Goals**
  - Reduce corporate influence on health and environment
  - **Eliminate harmful chemicals in food, water, air**
  - Reduce chronic disease, especially in children
  - Restructure FDA/CDC; limit authority (Project 2025)
- **Influenced by health and nutrition advocates**



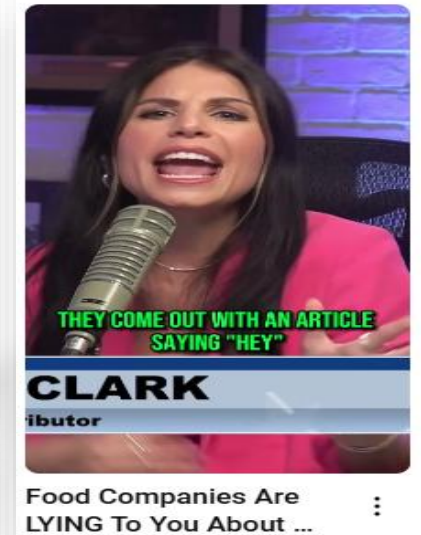
# MAHA Beliefs Regarding Food & Nutrition

- Foods have a huge impact on health
  - Rise in chronic disease, especially obesity, is tied to food
  - Foods are manufactured to be addictive
  - Ultra-processed foods must be eliminated
  - **Additives, added sugars must be restricted**
  - Animal derived saturated fat less of a concern, seed oils are problematic
- Closeness of government and food industry has resulted in an unhealthy food supply



## Reducing Chronic Disease

- Dietary Guidelines
- **Level of Processing**
- **Limiting Food & Color Additives**
- **Ingredient Transparency (e.g., GRAS Substances)**
- **Healthy Fats / Reducing Inflammation**
- **PFAS & Heavy Metals**
- **Limiting Pesticide Use**
- **Microplastics**



# MAHA & Federal/State Policymaking

- MAHA contributed to Trump's 2024 victory & then transitioned from grassroots movement to White House-backed agenda
- Republican Administration = Deregulatory
  - Decrease federal budget by shrinking workforce and cutting nonessential programs/spending
- Presidential Executive Orders focused on deregulation
- Limited/targeted federal policymaking (MAHA strategy or deregulatory focus)
  - Tension: Advance MAHA with fewer regulations while shrinking workforce and budgets*
- State legislatures fill federal policy making void to move MAHA agenda forward





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Dairy Foods Association**

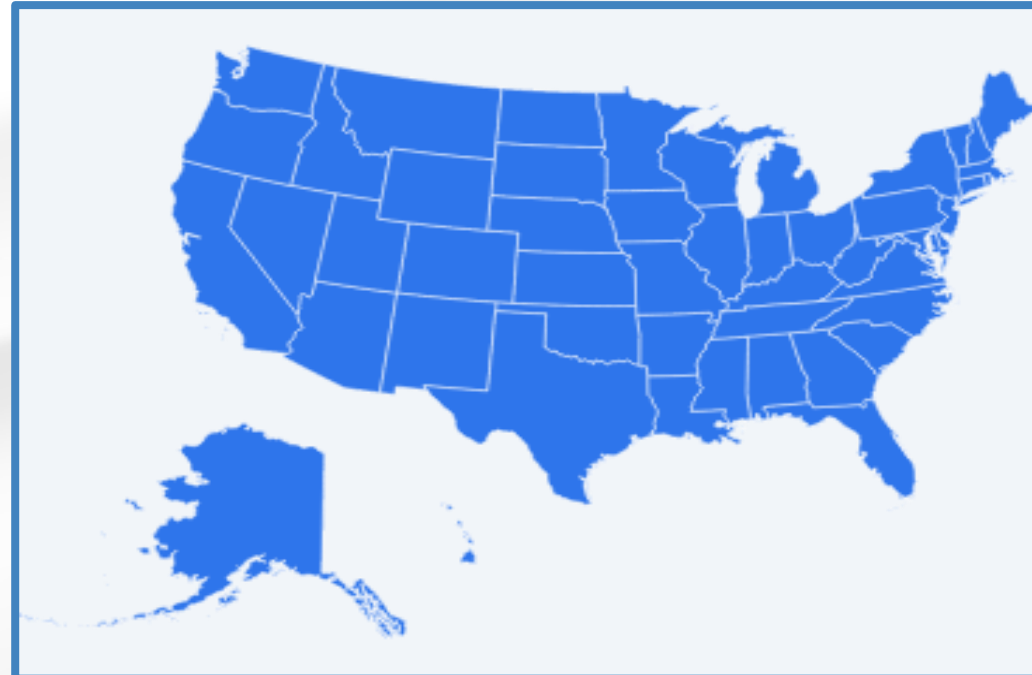
**MAHA Related State Legislative Activities**  
***Focus on Addressing MAHA Food and Nutrition Goals***

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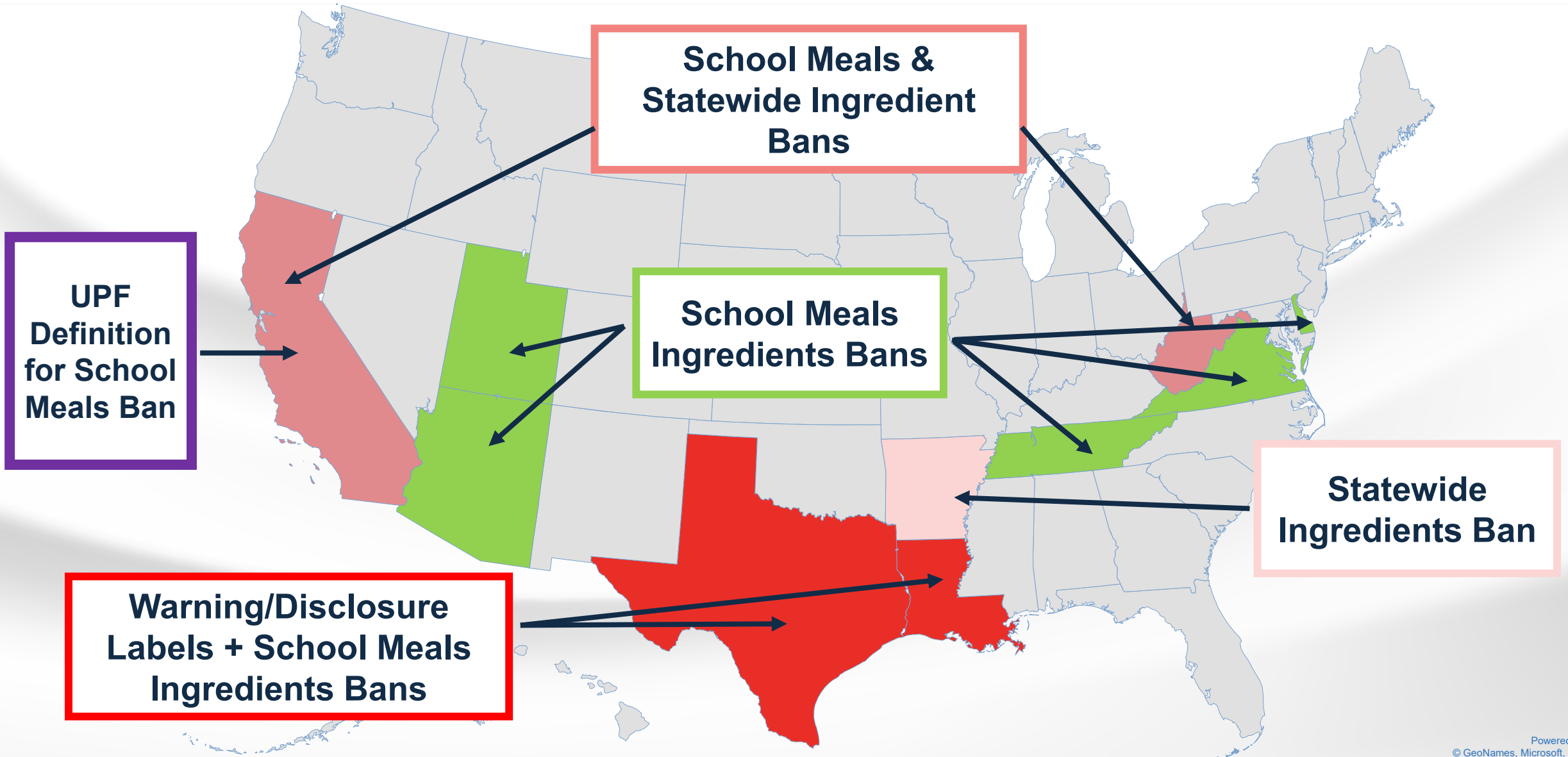
- **Food & Color Additive Bans**
  - In School Meal Programs and/or Statewide Bans
- **Food & Color Additive Warnings**
  - On Package Labelling or Digital Disclosure
- **UPF Definitions to Inform School Meal Bans**
- **Generally Recognized as Safe – GRAS**
  - Listings/registries for transparency; eliminate self-affirmed GRAS pathway, replace with mandatory GRAS notifications
- **Supplemental Nutrition Assistance Program (SNAP) Waivers/Restrictions**

## **NEWER:**

- Added sugars disclosures on restaurant menus
- Sugar taxes
- Restricted advertising of UPFs to children
- Caffeine disclosures/warnings



# 2025 State Food Chemical Safety Laws



- **acesulfame potassium (LA only)**
- acetylated esters of mono- and diglycerides (acetic acid ester)
- anisole
- **aspartame (LA only)**
- azodicarbonamide
- BHA & BHT
- bleached flour
- bromated flour
- calcium bromate
- canthaxanthin
- certified colors (all)
- diacetyl
- **diacetyl tartaric & fatty acid esters of mono & diglycerides (TX only)**

- dimethylamylamine
- dioctyl sodium sulfosuccinate
- **ficin (TX only)**
- interesterified palm oil
- interesterified soybean oil
- lactylated fatty acid esters of glycerol and propylene glycol;
- lye
- morpholine
- olestra
- partially hydrogenated oil (PHO)
- potassium aluminum sulfate
- potassium bromate

- potassium iodate
- propylene oxide
- propylparaben
- sodium aluminum sulfate
- sodium lauryl sulfate
- sodium stearyl fumarate
- stearyl tartrate
- **sucralose (LA only)**
- synthetic trans fatty acid
- thiodipropionic acid
- **titanium dioxide (TX only)**
- toluene

# 22 Approved State SNAP Restriction Pilots



## Products Targeted



Soda or Sweetened Beverages



Candy



Energy Drinks



Prepared Desserts

