



> MANUFACTURERS FEED AMERICA

Strengthening Communities, Fueling Innovation,
Growing the Economy

Executive Summary



Behind every grocery store shelf is a carefully designed system that ensures American families can count on safe, abundant and affordable food every day. The food and beverage industry is the largest manufacturing sector in the United States, connecting farms to factory floors to family tables.

Anchored in world-class science and rigorous safety standards, the U.S. food and beverage supply chain is a global leader—strengthening communities, fueling innovation and growing the economy. This outcome is not accidental. It is because **manufacturers feed America.**

The strength of this system is rooted in decades of sustained investment in science, technology, workforce development and operational excellence by manufacturers in the United States across the food and beverage supply chain. It is built on a federal regulatory system grounded in science and risk-based decision-making, a combination that has enabled America's global leadership to ensure a quality and robust food supply, protect public health and drive innovation. It is a result of nationwide policy consistency, driving the certainty manufacturers depend upon to manage a highly complex supply chain, function efficiently across state lines and deliver safe, affordable, accessible and nutritious food and beverage options to American families every day.

An Interdependent Food and Beverage Manufacturing Supply Chain



Manufacturers are central to this system. From farms and ingredient suppliers to processors, packagers, transporters and retailers, food manufacturing is an interconnected national enterprise. The industry supports more than **47 million jobs, \$2.8 trillion in wages** and **\$9.5 trillion in economic output**, touching every community in the country.¹ This economic engine drives growth across the nation, and particularly in rural and regional communities where food- and agriculture-related jobs anchor local economies. Manufacturing scale, operational efficiency and scientific innovation together ensure that food remains accessible and affordable across the country—especially for communities where fresh or minimally processed foods are limited by geography, infrastructure or cost.

Understanding the history of the U.S. food and beverage regulatory system through the lens of American manufacturing helps explain why it has succeeded and how that success can be put at risk by replacing evidence-based safeguards with ideological approaches. Science-based federal oversight, predictable regulatory pathways and national uniformity have allowed manufacturers to innovate responsibly, improve nutrition, expand consumer choice and respond effectively to supply chain disruptions. Recent legislative and regulatory developments at both the state and federal levels risk undermining the system. These proposals can increase costs, reduce access and slow innovation without improving public health.



Regulation and Innovation

The U.S. is the world's leading market for launching new and innovative foods and technologies—driving globally embraced innovations from farm to factory floor to kitchen table. This outcome did not happen on its own, either. It reflects not only the strength of our food and beverage industry but also the balanced regulatory system that promotes innovation while delivering the quality goods that Americans need.

A critical advantage of both the food and beverage manufacturing industry and the U.S. food regulatory framework is their foundation in scientific evaluation and risk-based assessment.² Federal oversight under the Federal Food, Drug, and Cosmetic Act, the primary federal law governing the U.S. food supply, and accompanying regulations promulgated by the United States Food and Drug Administration and United States Department of Agriculture establish a uniform national standard for food safety, ingredient authorization, labeling and manufacturing practices. This framework manages risk through rigorous scientific analysis, exposure assessment and continuous monitoring, rather than through prohibitions and limitations, an approach that encourages regulators and manufacturers to focus resources where they matter most and to adapt as science evolves.

Risk-Based Safety Evaluation Framework

Identify Substance and Its Intended Use

Plant-Extract A is a sweetener to be added to beverages as a sugar replacement.



Identification of Potential Hazard

Scientists gather all available information (e.g., studies on the substance, historical data, information on related compounds) to determine if Plant-Extract A has potential to cause harm.



Application of Safety Factors and Establishment of Safe Levels

Using toxicity data, scientists characterize how adverse effects change with dose and identify a health-protective benchmark for humans, applying uncertainty (safety) factors to account for animal-to-human differences and variability within the human population.



Exposure Assessment

Scientists estimate how much Plant-Extract A people may consume under the intended use, including how often and for how long, and across different age groups.



Final Safety Assessment

Scientists compare estimated dietary exposure to the health-protective benchmark from dose-response assessment to determine whether the intended use is expected to be safe, including consideration of uncertainty.



For example, using the same safety standard as required in submissions to FDA, the Generally Recognized as Safe regulatory framework allows companies to determine—based on publicly available scientific evidence and review by qualified experts—that a substance is safe for its intended use in food. A GRAS determination requires the same quality and quantity of scientific support as a premarket submission to FDA, including a Food Additive Petition. By allowing qualified experts to evaluate the safety of ingredients under their intended conditions of use, while maintaining FDA oversight and transparency, the system promotes and enables U.S. innovation without compromising safety. Importantly, GRAS conclusions must be based on published, publicly available data, ensuring transparency and allowing any interested party to evaluate the underlying basis for safety.³

This flexibility is critical to the development of new ingredients, improved processing methods that often result in safer, more nutritious and more stable foods and safer packaging technologies that enhance shelf life, reduce food waste and support nutrition. It also has made the United States the preferred market for launching new foods and technologies, attracting domestic and foreign investment and reinforcing American leadership in food science and manufacturing excellence.

Innovation in the food sector is not limited to headline breakthroughs. It often consists of incremental improvements that collectively deliver significant public health benefits. Advances in pathogen detection, sanitation systems, quality control software and genomic monitoring allow manufacturers to identify and address potential risks earlier in the production process. Packaging innovations, such as modified atmosphere packaging and aseptic processing, protect food safety while reducing reliance on refrigeration and extending shelf life.

Innovative ingredients enable the production of foods that meet diverse dietary needs, including gluten-free ingredients, reduced-sugar formulations and nutrient-fortified foods.

Manufacturers in the U.S. are leading the world in these life-enhancing innovations, making America the best place to invest, create jobs and grow communities.

Predictability: The Base of the (Food) Pyramid

These beneficial innovations are possible because manufacturers operate within a predictable regulatory environment that accounts for prior safety evaluations and allows responsible iteration. A stable and predictable environment supports long-term investment, business planning and job creation through the efficiencies of a single set of market regulations for the country.

For example, when manufacturers consider reformulating a product, adjusting a process or responding to supply disruptions, they rely on established scientific assessments and risk management principles rather than starting from scratch with each change. This proportional approach is essential for maintaining continuity of supply and affordability at a national scale.

Recent global disruptions underscore the importance of this system. During the COVID-19 pandemic, manufacturers adapted rapidly by adjusting production schedules, implementing enhanced sanitation protocols and leveraging digital tools to maintain oversight across supply chains. During natural disasters and infrastructure disruptions, shelf-stable and packaged foods provide critical nutrition when refrigeration and transportation are compromised. That reliability extends beyond emergencies. Shelf-stable and packaged foods play an essential role in everyday nutrition by delivering safe, affordable, and accessible food year-round. These advances in safety and innovation were made possible in large part because manufacturers could act within a flexible yet consistent and uniform science-based regulatory framework.





Challenges to a Strong, Affordable and Reliable Food System

Despite this record of success, the foundation of the United States food system is under increasing strain. A growing number of state laws seek to ban ingredients, impose warning labels or mandate disclosures based on hazard-focused explanations rather than risk-based science. More than 100 state food and beverage measures were proposed or enacted in 2024 and 2025 alone. These measures often conflict with federal safety determinations and create a patchwork of requirements that the national food supply chain was not designed to accommodate. Manufacturers cannot realistically produce multiple versions of the same product to satisfy differing state rules without incurring substantial costs, sacrificing quality or disrupting supply chains and distribution systems. These limitations risk inhibiting economic growth and could lead to withdrawing food and beverage options from certain markets altogether.

The consequences of this fragmentation extend beyond manufacturers. Consumers will face higher prices, reduced choice and confusing or conflicting messages about food safety. Workers and suppliers will experience uncertainty that affects investment and employment decisions. Small and medium-sized manufacturers are particularly vulnerable, in part because they operate on tight margins and are often still building the resources to manage complex compliance regimes. Policies that purport to protect consumers, but that are not grounded in science or an understanding of what makes regulations effective, can reduce access to affordable food and undermine trust in the food system, all without improving public health.

To ensure strong federal standards, manufacturers welcome reforms at the federal level that are carefully considered with thoughtful collaboration between Congress, regulatory agencies and industry stakeholders to ensure regulations maintain real-world effectiveness. Pragmatic changes to established pathways for ingredient evaluation, packaging authorization or manufacturing flexibility will drive innovation, attract research and development activity to the United States and strengthen the country's competitive position globally. In contrast to the U.S., other jurisdictions rely on precautionary or more-opaque regulatory models, which often delay public access to the same products cleared in the U.S. while at the same time increasing costs and uncertainty for manufacturers.

Regulation That Feeds Our Future

The U.S. food system has succeeded precisely because it integrates safety, innovation and scale within a coherent national framework. Manufacturers are active partners in implementing public health objectives, investing in continuous improvement and responding to evolving scientific understanding and consumer needs. Such a partnership depends on policies that are grounded in evidence, applied consistently and informed by how food is actually produced, distributed and consumed.

As policymakers consider the future of food regulation, manufacturers urge a clear focus on what has worked. Preserving science-based decision-making, maintaining federal leadership and national uniformity and supporting predictable pathways for innovation are not abstract principles. These principles are practical necessities for ensuring that food remains safe, affordable and accessible for all Americans. Strengthening collaboration among regulators, manufacturers and consumers will better position the United States to meet emerging challenges while sustaining its leadership in food production and manufacturing.

Manufacturers across the food and beverage supply chain, from small, family-owned businesses to some of the world's most well-known brands, are uniquely positioned to advocate for the protection—and where appropriate, modernization—of a well-regulated industry that enables innovation while delivering safe, nutritious and affordable food and beverage options to American families every day. The industry welcomes policymakers' interest in improving public health, and manufacturers share the goals of science-based innovation, responsible production and continuous improvement.





Policymakers are hard at work advancing a pro-growth agenda for U.S. manufacturing by promoting a competitive tax code, reducing unnecessary regulatory burdens, accelerating the adoption of modern technologies in advanced manufacturing and supply chain optimization and pursuing policies that support U.S. energy dominance. Manufacturers urge policymakers to apply these principles that work to support the food and beverage sector as well. That comes through regulations that support—rather than constrain—innovation, economic growth, job creation and strong communities.

Manufacturers across the food and beverage supply chain stand ready to partner with policymakers, as they have done successfully for more than a century. With thoughtful policy choices that respect science and operational realities, the United States will deliver an even stronger food system that supports public health, economic growth and global competitiveness—bolstering America as the best place in the world to make things and empowering manufacturers’ efforts to nourish the American people for generations to come.

Endnotes

1. See 2025 Feeding the Economy study, <https://feedingtheeconomy.com> (last visited January 2026)
2. See United States Food & Drug Administration, Risk Analysis of Food at FDA, <https://www.fda.gov/food/risk-and-safety-assessments-food/risk-analysis-food-fda> (November 2017). Risk-based assessment is a set of structured evaluations used to identify potential hazards associated with a substance and to determine the level at which the substance can be safely used in food. This typically entails identifying and characterizing any potential hazards in a substance, calculating the amount a human may come into contact with the substance (e.g., exposure through ingestion, inhalation, dermal exposure), carrying out toxicological studies and determining the level at which the substance may be safely used in food.
3. See 21 U.S.C. § 170.30(b) (providing that “general recognition of safety based upon scientific procedures shall require the same quantity and quality of scientific evidence as is required to obtain approval of a food additive. General recognition of safety through scientific procedures shall be based upon the application of generally available and accepted scientific data, information, or methods, which ordinarily are published, as well as the application of scientific principles, and may be corroborated by the application of unpublished scientific data, information, or methods.”).





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