



# Sugar Beyond the Checkout Lane

How Consumer Choice, Public Policy and Nutrition Narratives Shape Demand

*41st International Sweetener Symposium*

August 3, 2026 | Vail, Colorado

<sup>the</sup>  
**Sugar**  
association

**CAPROCK**  
STRATEGIES

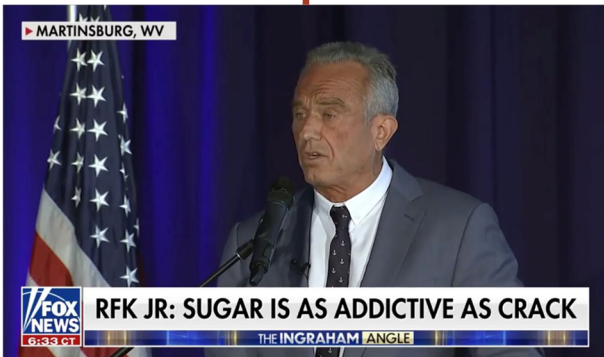


**Courtney Gaine, Ph.D., R.D.**  
*President and CEO*



# The Headlines Tell One Story...

April 8, 2025



April 22, 2025

RFK Jr calls sugar 'poison' but says government probably can't eliminate it

US health secretary says Americans should eat 'zero' sugar and announces plans to eliminate eight synthetic food dyes



January 7, 2026



## GenPop consumers aren't approaching sugar differently than they did a year ago.

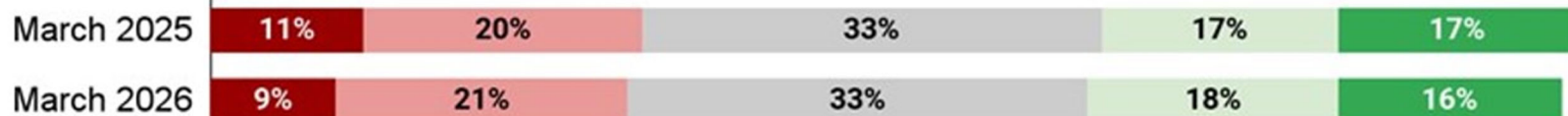
### GenPop's approach to dietary components

How do you approach each of the following when eating food in general? (2026) /

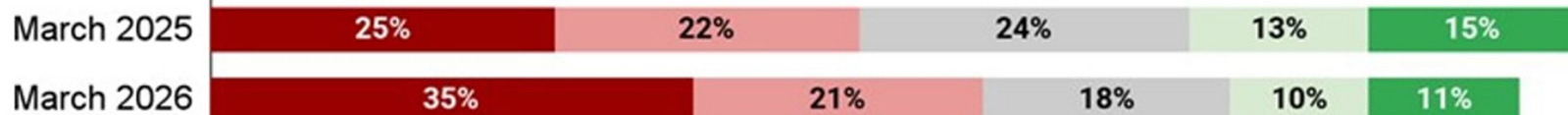
For each of the following, which best describes your view? (2025)

■ I actively avoid this ■ I significantly limit my intake of this ■ I limit this a bit, but it's fine in moderation  
■ I note when I'm consuming this, but I don't try to limit or avoid it ■ I don't pay attention to this ■ I'm not familiar with this

#### Real sugar



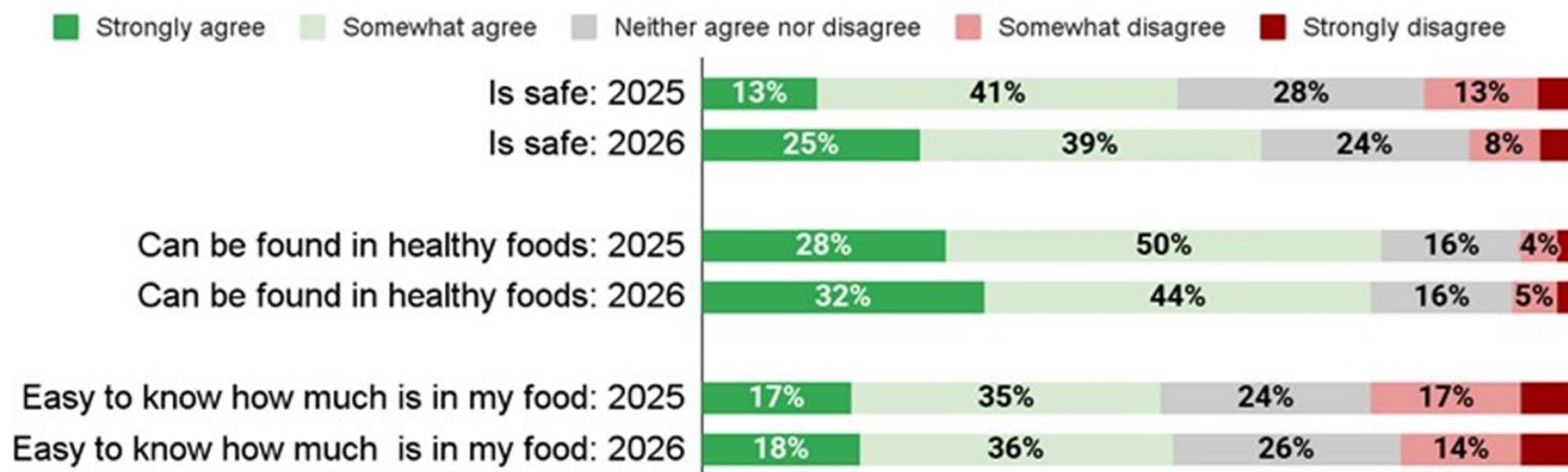
#### Artificial sweeteners



## Their views towards sugar are similar...

### GenPop's views of real sugar: *Real sugar...*

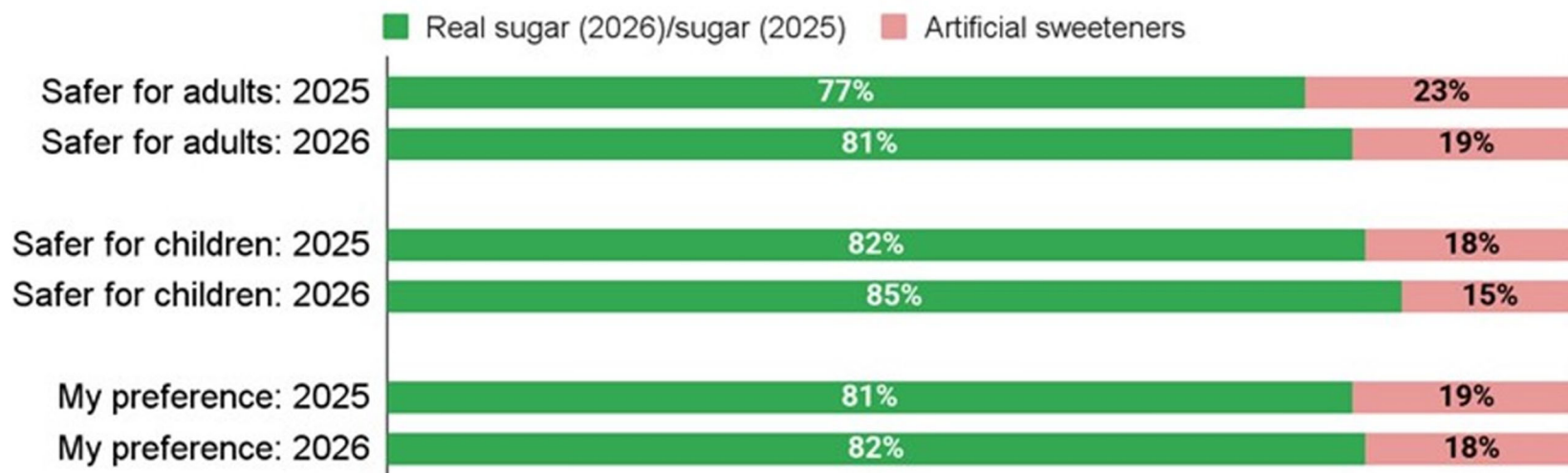
Based on what you know, to what extent do you agree with the following statements?



...and they still vastly prefer sugar to artificial sweeteners.

**GenPop's views: Sugar vs. artificial sweeteners**

Between the two, which is...



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## 88% of MAHA consumers believe real sugar can be part of a balanced lifestyle.

Below are statements that have been made about sugar. Do you agree or disagree with each statement?

*Showing responses among MAHA consumers, n=600. Rounding may cause data to add to more than 100%.*

■ Agree ■ Disagree

When it is consumed in moderation, real sugar can be part of a balanced lifestyle.

88%

12%

As a natural ingredient, real sugar fits well into the Make America Healthy Again movement to decrease the amount of industrial additives in our food supply.

88%

13%

In moderation, real sugar has a place in a balanced lifestyle by adding flavor and functions that help people enjoy a wide variety of foods.

89%

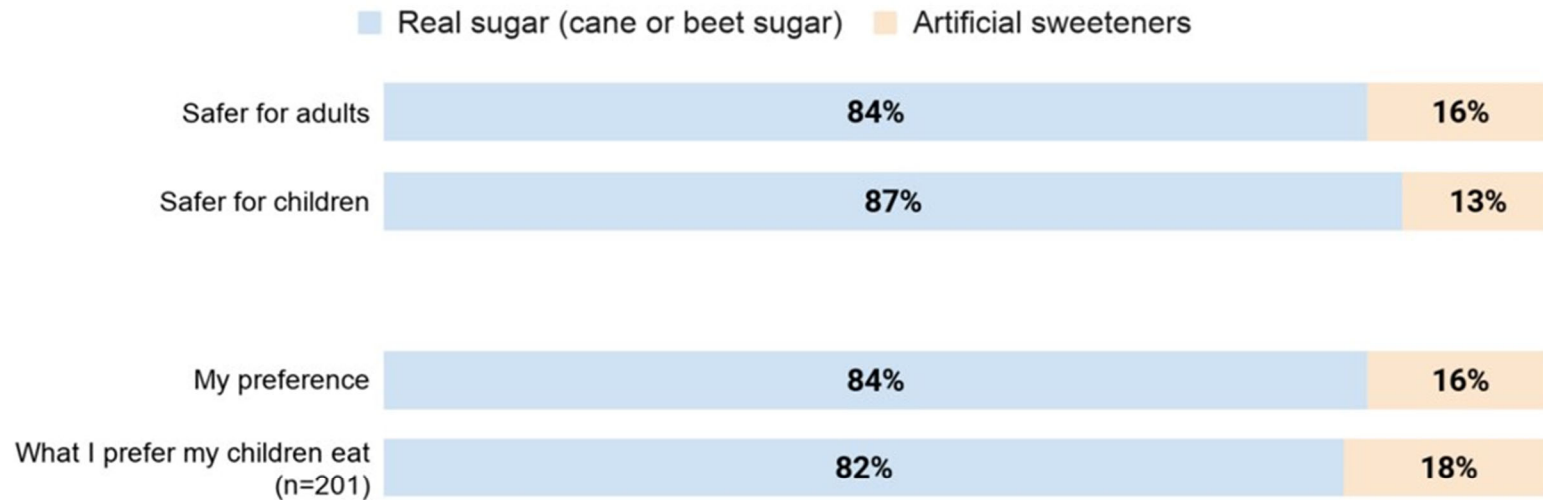
11%

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## Put head to head, MAHA consumers express a strong preference for real sugar.

**Between the two, which is...**

*Showing responses among MAHA consumers, n=600. "What I prefer my children eat" shown only to parents with children at home.*



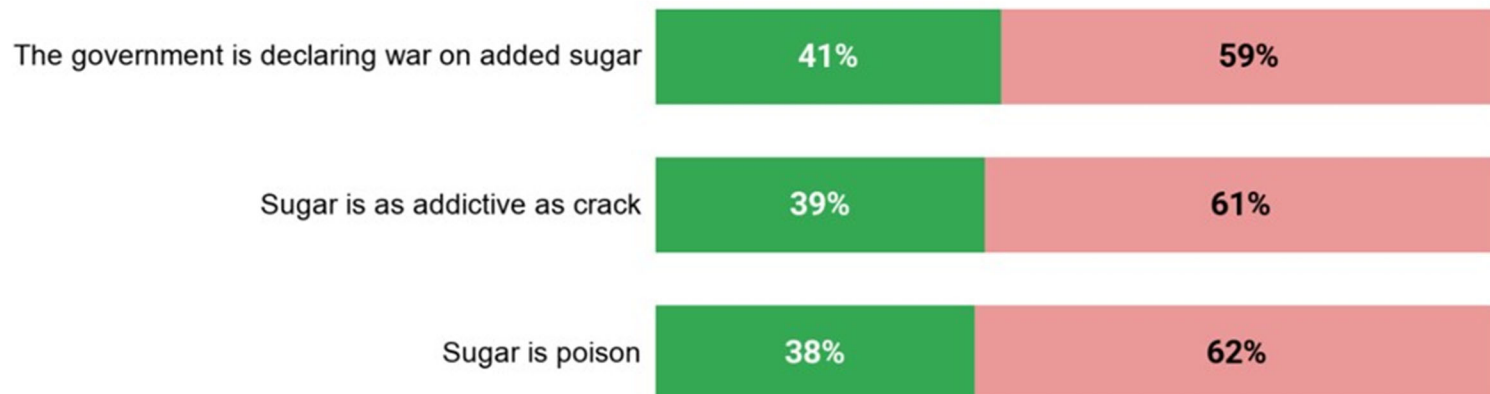
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## Six in 10 MAHA consumers say some of the admin's strongest anti-sugar rhetoric goes too far.

Below are statements that have been made about sugar. For each, which option is closest to your view?

*Showing responses among MAHA consumers, n=600.*

■ This statement shows the right level of concern. ■ This statement goes too far.





# What Drives Food Purchases?

Consumers are complex and balance multiple priorities.

**01**

## **Taste**

Primary driver of purchasing decisions.

**02**

## **Price**

Household budget & affordability.

**03**

## **Convenience**

Accessible and effortless.

**04**

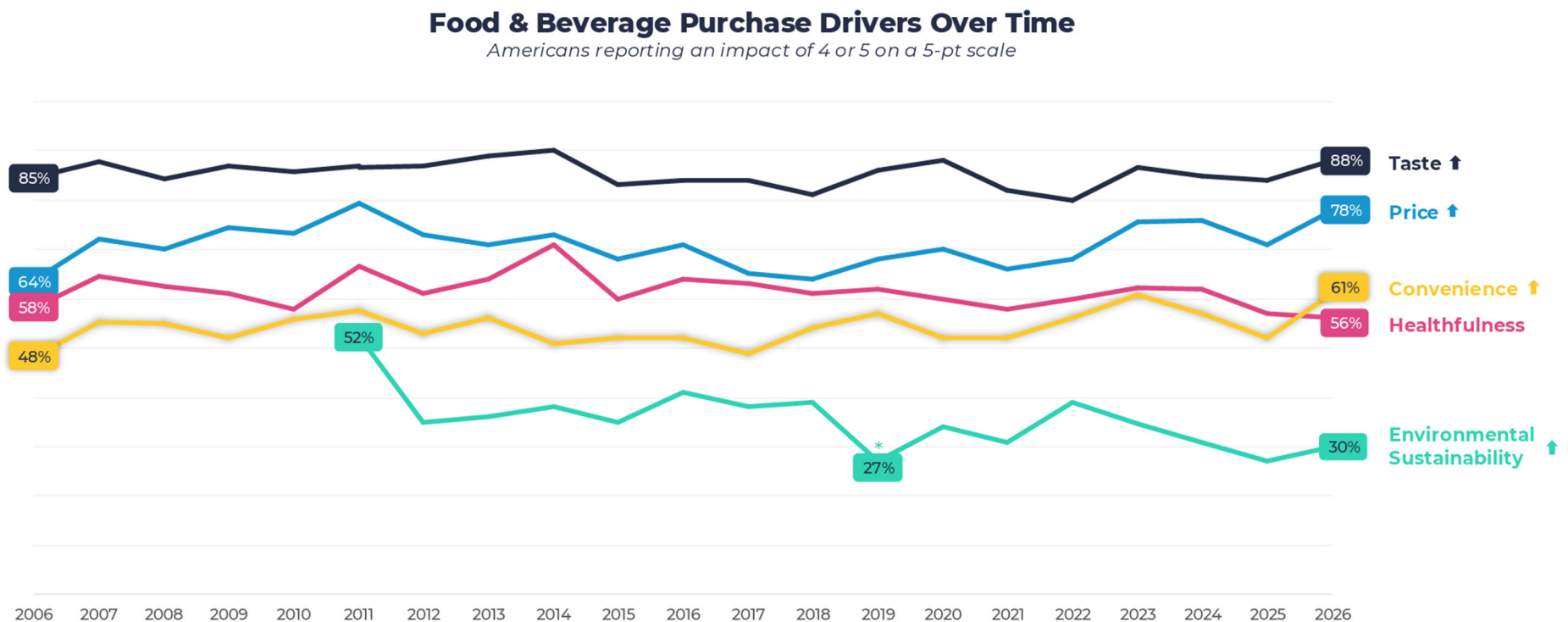
## **Healthfulness**

Nutrition goals & wellness concerns.

Consumers don't make decisions based on one issue. They balance affordability, enjoyment, convenience and health every time they shop.

# For the first time in the 21-year history of the IFIC Food & Health Survey, convenience surpasses healthfulness as a top purchase driver.

Taste (88%) and price (78%) continue to have the greatest impact on food and beverage purchase decisions in 2026, while convenience ranks ahead of healthfulness (61% vs. 56%) and environmental sustainability remains the least influential (30%).



Source: International Food Information Council (IFIC) Food & Health Survey, 2026



**Brandon Lipps**  
*Co-Founder and Principal*

**CAPROCK**  
STRATEGIES

# Government Policy Can Reshape the Marketplace Even When Consumer Demand Remains Stable.

- 01 **Consumer demand** for sugar has not collapsed.
- 02 **Consumers balance** affordability, enjoyment, convenience, and health.
- 03 **Markets change** when the government changes the marketplace.

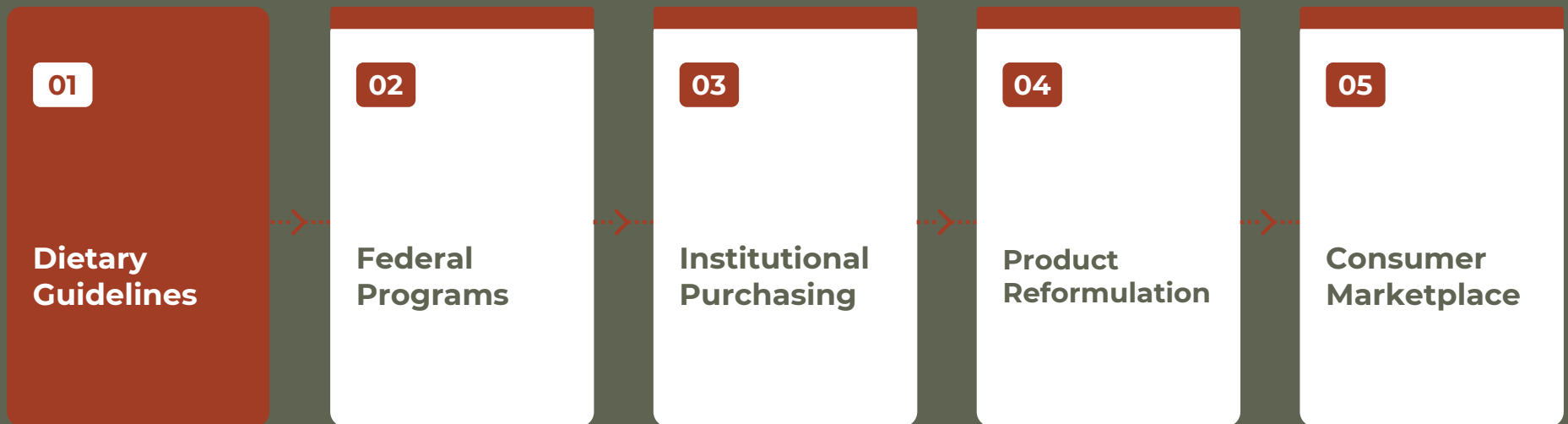


## **The MAHA Movement** is Transitioning from Public Conversation to Federal Nutrition Policy

- RFK Jr., HHS and USDA influence.
- Cross-party political support.
- Long-term shift in public health and ingredient scrutiny.



# Dietary Guidelines Act as the First Domino in Reshaping the Consumer Marketplace.



# School Meal Proposals Are the First Battleground Where Grower Voices Matter.



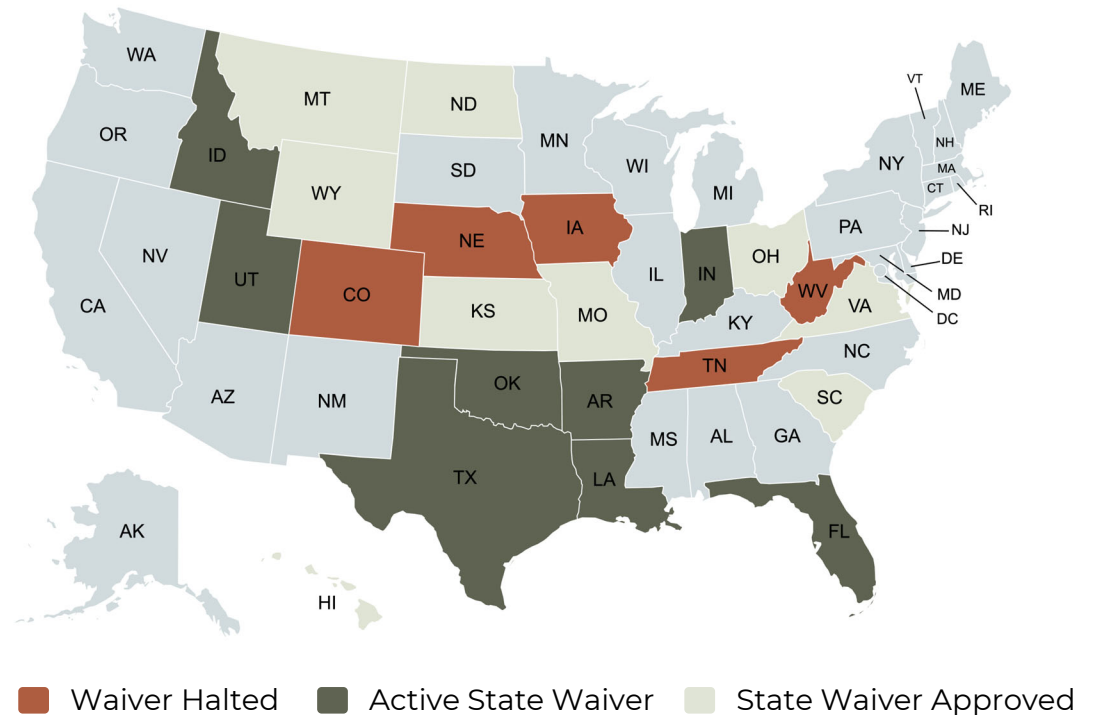
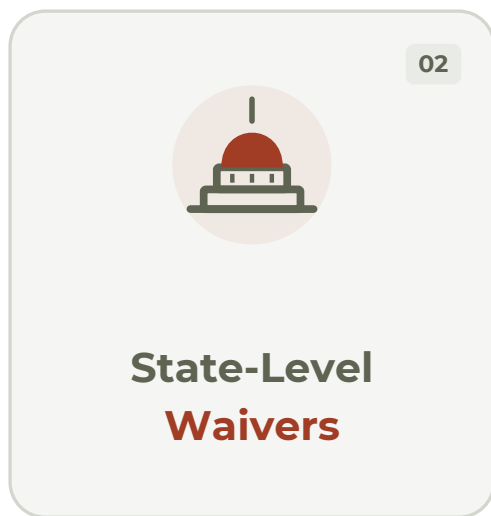
## Comment Period Significance

- Current proposals impact institutional purchasing.
- Open comment periods require engagement.
- Government shapes the menu of choices.

# Various Tools Are Used to Shift the Marketplace.



# Various Tools Are Used to Shift the Marketplace.





## Various Tools Are Used to Shift the Marketplace.





## Facts Build Policy, **But Emotion Builds Momentum.**

- ◆ The real challenge isn't science.
- ◆ Emotion spreads much faster than facts.
- ◆ Lasting policy requires an evidence-based approach.

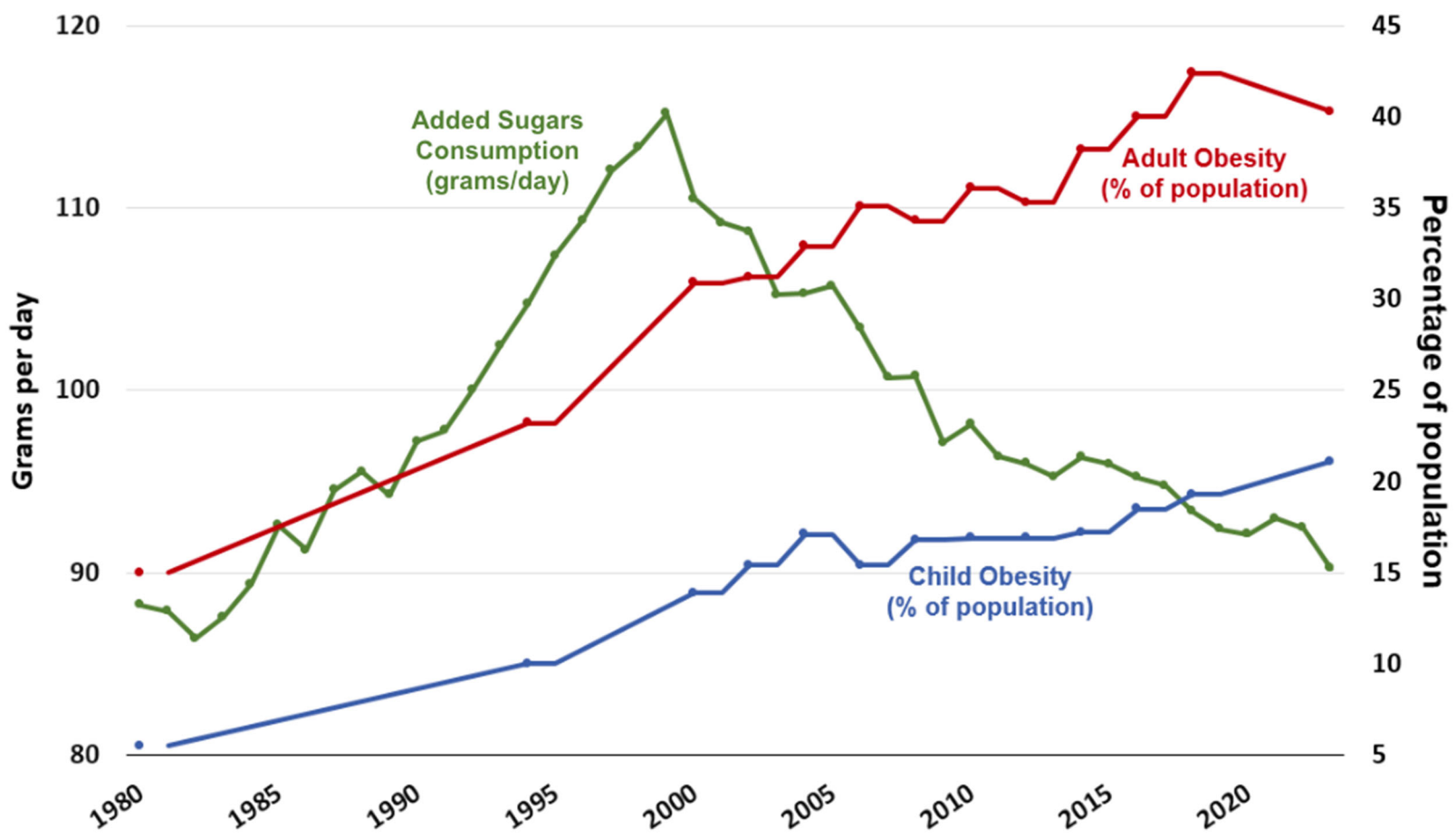
## Our Responsibility is to Consistently Present Facts Rather Than Compete With Emotion.



### Core Imperatives

- Viral imagery creates false perceptions.
- Emotion spreads faster than facts.
- Consistently present the evidence.

# Added Sugars vs Obesity (1980-2023)



Sources: USDA ERS Food Availability Reports, NHANES Obesity Estimates



# Sugar Stands on Solid Footing When Grounded in Evidence.

**01** A real food.

**02** Safe.

**03** Supported by science.

**04** Appropriate in  
moderation.



## The Most Important Policy Conversations **Happen at Kitchen Tables,** Not Just in Washington.



- Humanize the issue.
- Share your stories.
- Connect agriculture to communities.

# Farmers Possess Credibility

*that trade associations & government agencies cannot buy.*

01

High public trust in farmers.

02

Authentic voices in the community.

03

Unique credibility.



# Engage Locally and Submit Comments to Ensure Your Voice is Heard.

## Action 01

### Submit Comments

Submit comments on proposals.

## Action 02

### Engage Locally

Engage with local boards and government.

## Action 03

### Talk to Neighbors

Share with friends and neighbors.

## Ultimate Goal

### Make Your Voice Heard

Ensure your story and the facts are told.

# Lasting Policy Must Be Grounded in Evidence to Ensure a Fact-Based Future.

- 01 The science is on your side.
- 02 The facts are on your side.
- 03 Ensure those facts continue to be heard.

Q&A



Thank You!  
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the  
**Sugar**  
association



# Contact

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|                                                            | Current Intakes | USDA New Stds (2027)       | USDA: Current         | 2025 DGAs   | DGA: Current            |
|------------------------------------------------------------|-----------------|----------------------------|-----------------------|-------------|-------------------------|
| <b>BREAKFAST</b> (Breakfast: 15M/day, 2.6B/year)           |                 |                            |                       |             |                         |
| <b>K-5</b>                                                 | 21g (17%)       | $\leq 12.5\text{g}$ (10%)  | -9g                   | 0g (0%)     | -21g                    |
| <b>6-8</b>                                                 | 23g (17.3%)     | $\leq 13.75\text{g}$ (10%) | -9g                   | 10g (8-10%) | -13g                    |
| <b>9-12</b>                                                | 23g (16.9%)     | $\leq 15\text{g}$ (10%)    | -8g                   | 10g (6-8%)  | -13g                    |
| <b>BREAKFAST TOTAL CHANGE PER DAY</b>                      |                 |                            | -26g                  |             | -47g                    |
| <b>LUNCH</b> (Lunch: 28.1M/day, 4.8B/year)                 |                 |                            |                       |             |                         |
| <b>K-5</b>                                                 | 18.5g (11.5%)   | $\leq 16.25$ (10%)         | -2g                   | 0g (0%)     | -18g                    |
| <b>6-8</b>                                                 | 18.2g (11%)     | $\leq 17.5\text{g}$ (10%)  | -1g                   | 10g (6-7%)  | -8g                     |
| <b>9-12</b>                                                | 19.5g (10.6%)   | $\leq 21\text{g}$ (10%)    | +2g                   | 10g (4-5%)  | -10g                    |
| <b>LUNCH TOTAL CHANGE PER DAY</b>                          |                 |                            | -1g                   |             | -36g                    |
| <b>Total change across school meals (lbs/yr; STRV/yr):</b> |                 |                            | -60M lbs<br>-32K STRV |             | -250M lbs<br>-133K STRV |

### 3 in 4 Americans prefer a front-of-pack label that discloses the inclusion of artificial sweeteners.

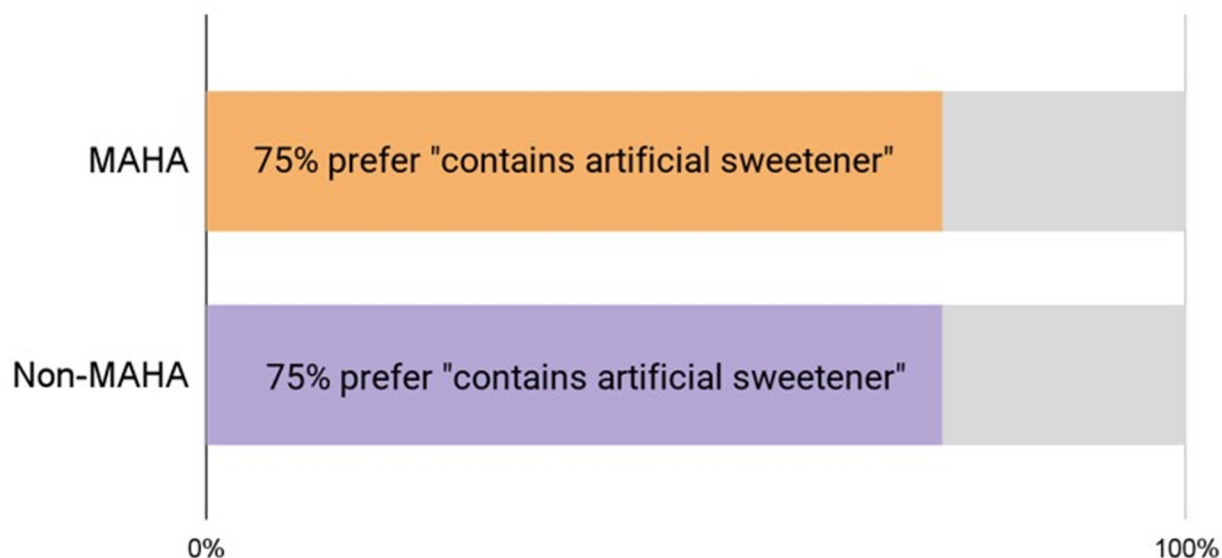
| Nutrition Info |     |        |
|----------------|-----|--------|
| Per serving    |     | %Daily |
| 1 container    |     | Value  |
| Saturated Fat  | 18% | Med    |
| Sodium         | 37% | High   |
| Added Sugars   | 5%  | Low    |
| FDA.gov        |     |        |

CONTAINS  
ARTIFICIAL  
SWEETENERS

| Nutrition Info |     |        |
|----------------|-----|--------|
| Per serving    |     | %Daily |
| 1 container    |     | Value  |
| Saturated Fat  | 18% | Med    |
| Sodium         | 37% | High   |
| Added Sugars   | 5%  | Low    |
| FDA.gov        |     |        |

Please review these two images. One contains the words "contains artificial sweeteners," while the other does not. They are otherwise the same.

Imagine you were planning to purchase this food product. Assuming the product contains artificial sweeteners, which of these labels would you prefer to see on the product?



Real  
ingredients  
you know



or

Industrial  
additives  
you don't



When real sugar goes out, what goes in?



Real  
Sugar