

What MAHA's dietary guidelines mean for US food and agribusiness

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Summary

The new 2025-2030 Dietary Guidelines for Americans – influenced by the Make America Healthy Again movement – signal a major shift toward minimally processed, whole foods with stricter limits on added sugars and refined carbohydrates. While dairy and animal-based proteins and fats stand to benefit from the more favorable recommendations, sugar, refined grains, and processed meats face headwinds. The guidelines also reinforce fruits, vegetables, and whole grains as dietary staples in an overall push for products typically located in the perimeter of grocery stores, not center aisles.

The guidelines may directly influence institutional food purchases and influence public perception, though the near-term impact on consumer spending is uncertain. If paired with additional government programs and incentives, they could trigger long-term changes in agricultural production and food supply chains.

Affordability and access to fresh foods remain key challenges to the guidelines' broad implementation, especially with reduced Supplemental Nutrition Assistance Program funding and rising food costs. Effective change to the American diet will depend on collaboration between government, industry, and consumers to balance health priorities with cost and convenience.

Food processors had already been innovating to reformulate products and make greater health claims, aimed at defending category relevance and capturing price premiums. The new guidelines will reinforce these ongoing efforts.

The Dietary Guidelines for Americans, 2025-2030

On January 7, 2026, the US Department of Agriculture (USDA) and the Department of Health and Human Services (HHS) released the [Dietary Guidelines for Americans](#) (DGA) for 2025-2030. Updated every five years as mandated by law, these guidelines serve as the cornerstone for nutrition policy, public health outcomes, and federal food programs that reach nearly one in four Americans.

The latest edition reflects the core principles of the Make America Healthy Again (MAHA) movement. In their introduction to the new guidelines, HHS Secretary Robert F. Kennedy, Jr., and USDA Secretary Brooke Rollins characterize this release as a "reset" in American eating habits, emphasizing the consumption of whole, nutrient-dense foods as the most effective path to improved public health and reduced healthcare costs. They even cite it as a national security matter aimed at [increasing military personnel readiness](#).

How the new guidelines differ from the previous edition

While “reset” might be an overstatement, the new dietary guidelines do introduce several notable changes compared to the 2020-2025 edition. This version adopts a more prescriptive and assertive approach to defining what is healthy, whereas the previous version allowed greater flexibility and customization based on individuals’ health, preferences, and budgets.

Branded as “Eat Real Food,” the guidelines’ core message aligns closely with ongoing public health initiatives and trends – particularly a focus on protein intake and heightened scrutiny of ultra-processed foods. In the new DGA, the latter category includes products containing non-nutritive ingredients (e.g., synthetic dyes, preservatives, artificial sweeteners), as well as added sugars, sodium, “unhealthy fats,” and – more innovatively – refined carbohydrates, which previous guidelines did not cover. Unlike the previous edition, which suggested consuming such foods in moderation, the new guidelines explicitly identify ultra-processed foods as harmful to health. According to Kennedy and Rollins’ introduction to the new DGA:

The United States is amid a health emergency. Nearly 90% of health care spending goes to treating people who have chronic diseases. Many of these illnesses are not genetic destiny; they are the predictable result of the Standard American Diet – a diet which, over time, has become reliant on highly processed foods and coupled with a sedentary lifestyle.

At first glance, the new guidelines are substantially shorter – a 10-page fact sheet outlining key takeaways and directives (followed by a 418-page scientific appendix). This streamlined format aims to improve accessibility and clarity for the broader public. Table 1 summarizes additional differences between the two versions in both substance and form.

Table 1: Detailed comparison of the Dietary Guidelines for Americans, 2025-2030 vs. 2020-2025

| Category | 2025-2030 Guidelines | 2020-2025 Guidelines |
|-------------------------|---|---|
| Overall approach | Emphasizes a simple, bold message: “Eat real food, avoid ultra-processed”; prioritizes nutrient density and food quality. | Emphasizes balanced eating patterns using MyPlate; focuses on nutrient adequacy and chronic disease prevention. |
| Protein recommendations | Recommends increased intake: 1.2 to 1.6g/kg body weight; stresses protein at every meal and highlights high-quality sources. | Recommends minimum of 0.8g/kg body weight; encourages variety. |
| Dairy and fat guidance | Allows full-fat dairy without added sugars; reframes saturated fats as acceptable within limits; promotes whole-food fats. | Recommends low-fat or fat-free dairy; limited saturated fat to <10% of calories. |
| Carbohydrates and sugar | Sets no ideal amount for added sugars, but adds a stricter per-meal cap ($\leq 10g$); discourages refined carbs and sugary snacks. | Limits added sugars to <10% of daily calories; encourages whole grains and fiber-rich foods. |
| Ultra-processed food | Explicitly advises avoiding ultra-processed foods (e.g., chips, candy, sugary cereals, deli meats, artificial additives). | Does not explicitly mention ultra-processed foods; focuses on limiting sugar, sodium, and saturated fat. |
| Alcohol and beverages | Simplifies the message to “consume less” alcohol; strongly promotes water and unsweetened beverages for hydration. | Advises limiting alcohol and reducing sugary drink consumption; encourages drinking water. |
| Visual framework | Inverts the food pyramid, putting protein and dairy at the top left, followed by vegetables/fruits on the right, with whole grains at the bottom; excludes processed foods. | Uses the MyPlate graphic, with equal emphasis on fruits, vegetables, grains, protein, and dairy. |
| Document format | Concise 10-page summary with clear, actionable steps and visual aids; appendices available separately. | Extensive 164-page report with scientific detail and appendices. |

Source: Dietary Guidelines for Americans, 2025-2030, RaboResearch 2026

Impact across food segments

We consulted category experts from across RaboResearch to assess the anticipated implications of the new dietary guidelines for key sectors:

Dairy

Dairy is positioned positively in the new guidelines, which highlight it as a core dietary recommendation alongside other proteins and healthy fats. Most dairy products are minimally processed, aligning with the "real food" message. The endorsement of whole milk and full-fat dairy marks a significant shift – the first time in over four decades that the guidelines have referenced these products favorably. This change aligns with recent legislative developments, such as the Whole Milk for Healthy Kids Act of 2025, which permits schools to serve milk containing all levels of fat. The guidelines recommend three servings of dairy per day and suggest whole milk for infants transitioning from formula or breastfeeding.

From a supply perspective, the industry is well-prepared to meet potential shifts in consumer demand toward full-fat dairy. US dairy farmers have increased milk fat production following the recent surge in butter prices, ensuring ample availability of cream and higher-fat dairy products.

Sugar

The new guidelines impose a stricter cap on added sugars ($\leq 10\text{g per meal}$), signaling a reduction from previous recommendations. US demand for both high-fructose corn syrup and granulated sugar has declined in recent years, while domestic production remains stable. Sugar imports have fallen, and drought conditions have constrained Mexico's ability to supply the US market.

Interestingly, honey sales have increased over the past year. According to SPINS, volumes were 10% higher in 2025. While far from offsetting the decline in sugar, this trend suggests growing consumer acceptance of perceived "natural" sweeteners.

Seed oils and other vegetable oils

Despite Secretary Kennedy's previously stated distaste for seed oils – vegetable oils extracted from the seeds of plants like sunflower, corn, soy, canola, and grapeseed – the current guidelines do not specifically mention them. This is a win for the oilseed crushing industry and food manufacturers.

However, the broader recommendation to limit the consumption of deep-fried and processed food could negatively impact the seed oil segment. Additionally, the growing promotion of animal fats – such as butter and beef tallow, now positioned as "healthy fats" – poses another potential challenge to vegetable oil demand.

The only explicit recommendation for vegetable oil consumption is for "oils with essential fatty acids, such as olive oil." While avocado oil – a non-seed oil, like olive oil – has gained popularity over the past year, including within MAHA circles and for use in certain premium packaged goods, it is not mentioned in the main factsheet. Avocados, the fruit, however, are listed as a source of healthy fat, which makes us believe avocado oil will continue to be a trendy ingredient associated with healthiness.

Bakery and milled products

While the DGA advises consumption of whole grains, it explicitly recommends avoiding refined flour and its derivatives (e.g., white bread, flour tortillas, crackers). The guidelines did not incorporate the grain food industry's appeal to recognize the benefits of flour enrichment (e.g., iron, B vitamins), instead prioritizing fiber content. This stance may drive innovation in bakery formulations and milling practices to focus on adding whole grains to recipes and formulations,

though challenges remain regarding manufacturing feasibility, economics, and consumer acceptance.

Currently, whole grain flour trades at a premium to refined flour due to its smaller scale and consumer perception. However, whole grain flour yields are higher, presenting opportunities for cost reduction through economies of scale as supply expands.

Meat, poultry, seafood, and plant-sourced protein

The increased protein recommendation to 1.2 to 1.6g per kg of body weight represents a 50% to 100% rise over previous guidelines. Notably, the new guidelines do not differentiate between beef and other red meats versus leaner cuts and seafood. As Secretary Kennedy stated in his speech introducing the DGA, "It's the end of the war against saturated fats," though the previous guideline restricting intake to 10% of total calories is still maintained.

While most Americans' protein consumption likely already meets these targets, the guidelines may shift demand toward fresh, minimally processed meats and away from processed meat products, such as hot dogs, sausages, and bacon, which are discouraged due to their high sodium and additives. Although processed meats are not prohibited, the guidelines' negative stance toward processed food may influence consumer choices.

The guidelines encourage a mix of animal and plant-based protein sources. In practice, however, animal proteins remain far more prevalent and traditional in consumer diets compared to plant-based options. Among animal protein options, chicken, turkey, and eggs are generally favored by consumers, partly due to their price competitiveness. This trend will likely persist, given the new guidelines' more favorable stance toward animal-based proteins.

Pulses, nuts, and seeds are promoted as healthy protein sources, with the tree nut industry well-positioned to meet increased demand following aggressive domestic marketing efforts. Currently, only 30% of almonds, pistachios, and walnuts are consumed domestically.

Fruits and vegetables

Fruits and vegetables remain a cornerstone of the guidelines, with sufficient supply to meet potential demand increases. However, restrictions on juice due to added sugar, including recommendations to dilute it with water, are drawbacks for this segment.

The category could benefit if school lunch programs replace packaged snacks with fruits and vegetables.

Alcoholic beverages

Previous guidelines advised avoiding alcohol or limiting intake to two drinks per day for men, one for women, and one for adults over 65. The latest recommendations simplify this message to: "Consume less alcohol for better overall health." The industry had feared stricter limits. Instead, this outcome is viewed as a win, though it is unlikely to significantly impact consumption.

Conclusion

The 2025-2030 Dietary Guidelines for Americans sets a new course in US nutrition policy, prioritizing animal-based proteins and fats and whole, minimally processed foods. These guidelines bring the standards for federal food programs closer in line with the MAHA initiative. If paired with additional government programs and incentives, they could trigger long-term changes in agricultural production and food supply chains.

Besides public perception, the guidelines may directly impact institutional food purchases, including 45 million school lunches daily, 9 million meals for veterans in VA hospitals, and meals for 1.3 million active-duty military members. However, implementing recommendations centered

on fresh foods and higher protein intake will remain challenging due to affordability and access constraints for both lower-income families and a federal government operating at a deficit.

Replacing processed foods with fresh alternatives – typically located in the perimeter of the grocery stores – requires higher food spending and more preparation time for consumers. This comes at a time when cost of living and affordability for basic items, including food, rank as top concerns for Americans. On the policy side, the One Big Beautiful Bill recently reduced Supplemental Nutrition Assistance Program (SNAP) funding by USD 195 billion over the next decade and dismantled the Thrifty Food Plan reevaluation, which historically adjusted SNAP benefits based on changes to the dietary guidelines. Future increases will be tied only to inflation, making it harder for lower-income families to access foods recommended in the DGA.

Nevertheless, the government's acknowledgment of the negative health impacts of extensive consumption of ultra-processed foods marks a turning point in American food policy. If embraced by future administrations, this shift could reshape US agricultural production and the downstream food processing industry.

A transition away from processed foods toward fresher options would require significant investment in logistics and cold-chain infrastructure plus support for diverse agricultural production. The Make Our Children Healthy Again strategy released by the White House in September 2025 outlines several related initiatives, though details on their implementation remain unclear. From a demand perspective, the guidelines' direct impact on consumer behavior remains uncertain. Adoption will depend on sustained commitment from government, industry, and consumers to prioritize health and nutrition over convenience, cost, and the widespread appeal of ultra-processed foods that has shaped American eating habits over the past half century.

Meanwhile, food processors are expected to incorporate growing consumer and regulatory awareness of processed foods into their innovation strategies. As noted in our recent [report on ultra-processed foods](#), we anticipate the rise of "better UPFs": products featuring significant reformulations and enhanced health claims, designed to capture price premiums while defending category relevance and brand positioning.

Looking ahead, we expect innovation to echo the new guidelines' priorities with a focus on protein-forward offerings, products with lower added sugar, clean-label formulations, and convenient fresh options for both on-the-go and at-home consumption. There will also be greater emphasis on fiber and gut health, whole milk and full-fat dairy products, and low-calorie beverages, among other priorities.

Many of these trends were already underway before the release of the guidelines. In this sense, the Dietary Guidelines for Americans do not necessarily create a new market for healthier products; rather, they provide validation and recognition of shifts that were already being driven by consumers' increasing interest in nutrition, wellness, and health-forward food choices. The DGA can, however, serve as an important catalyst. By reinforcing these patterns in an official federal framework, the guidelines have the potential to amplify their influence across public nutrition programs, shape future regulatory initiatives, and strengthen consumer perception – particularly if paired with additional policy actions, industry commitments, and educational campaigns.

Imprint

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