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ISSUE BRIEF

Taming the Grocery Bill:
Policy reforms to make food more affordable and prices less volatile

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Executive Summary

- **Food affordability is a growing problem.** Rising prices continue to create problems for families. The elevated cost of food is a significant contributor to these difficulties. The USDA expects food costs will increase 3.4 percent this year, which is a significant increase in the rate of food inflation relative to the past two decades.

- **Rising energy prices and fertilizer shortages are the impetus for these higher prices.** The conflict with Iran and closing of the Strait of Hormuz caused oil prices to surge. Higher gas and diesel prices have directly increased the costs of producing and transporting food. The conflict has also significantly curtailed the supply of key fertilizer and fertilizer components (e.g. sulfur), which have been exacerbated by China's anti-trade suspension of phosphate and nitrogen-potassium fertilizer exports. The net result is higher food costs for consumers.

- **The Federal Trade Commission (FTC) antitrust investigation into fertilizer companies is the wrong response.** Costs are not increasing due to antitrust actions. The higher costs are the expected (and necessary) responses when supplies are suddenly and unexpectedly curtailed. Instead of the proposed investigation, the federal government should remove the barriers that artificially increase costs and create unnecessary supply rigidities.

- **Regulatory reforms can address the supply chain's current deficiencies.** There are numerous policies that are obstructing market efficiencies in the food and fertilizer markets. Reforming these policies is a much more effective approach for promoting greater affordability and stability for food consumers. These changes include,

    - Reforming the long and costly federal permitting process that is exceptionally burdensome in the U.S.
    - Eliminating all tariffs on food products and ensuring that tariffs are not applied to fertilizers and fertilizer components.
    - Engaging in free trade negotiations with China to expand and enforce a rules-based system that eliminates China's current export bans.
    - Eliminating other unnecessary regulations such as the Jones Act that artificially inflate costs.

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Introduction

Despite a deceleration in inflation in June 2026, prices continue to grow at an unaffordable rate for families.[1] Driving these cost increases are higher energy and food prices. More troubling for consumers, rising food costs are expected to persist. According to the USDA's May food-price outlook, overall food prices will rise 3.4 percent this year, up from the 2.9 percent forecast issued in April. This rate of grocery inflation is well above what consumers have come to expect over the past two decades.[2]

In response to the higher food costs, the Administration has launched a Federal Trade Commission (FTC) antitrust investigation into fertilizer companies.[3] Anti-trust concerns are not driving consumers' cost problems, however. Higher prices are precisely what you would expect from the confluence of current events that include: Middle East hostilities cutting off major oil, petrochemical, and fertilizer suppliers; shortages of key fertilizers caused by China's global supply restrictions; and long-standing U.S. regulatory burdens.

The FTC investigation is not focused on these fundamentals so it will neither improve affordability today nor help consumers withstand unexpected volatility tomorrow. Troublingly, these investigations inevitably increase the regulatory burden, which will worsen the economy's susceptibility to shortages and other cost pressures in the future.

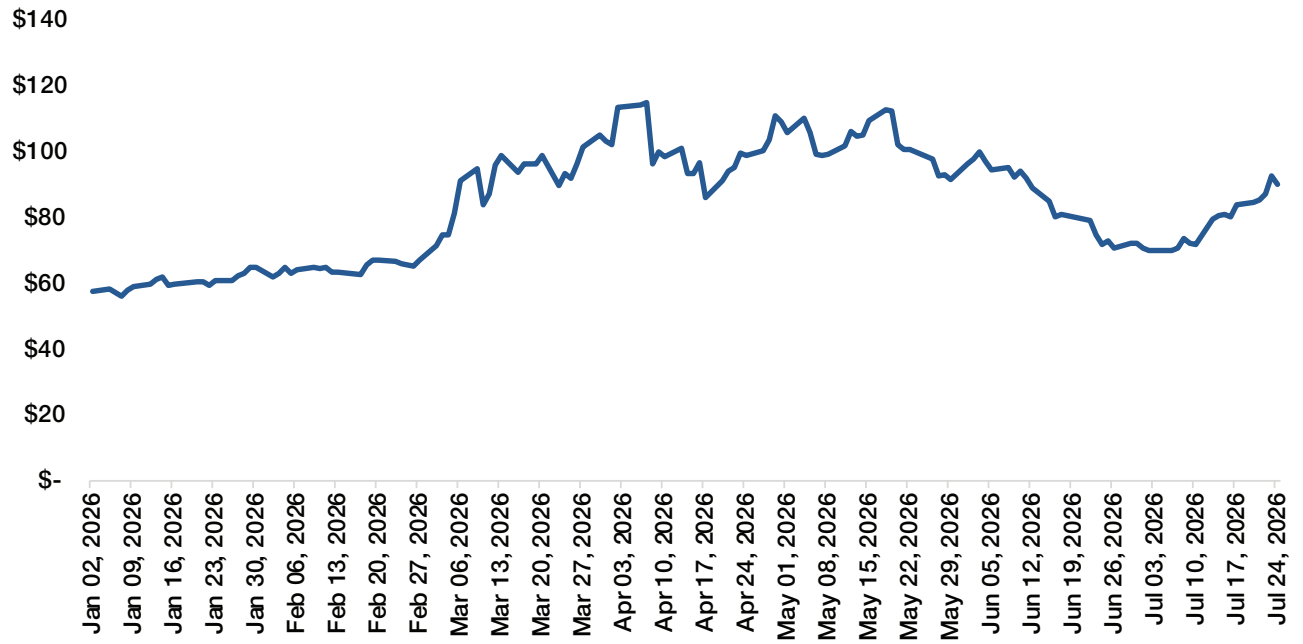
Rather than conducting another government investigation, Washington policymakers should focus on reforms that can address the supply chain's current deficiencies. These policy changes should include addressing the long and costly federal permitting process, eliminating unnecessary regulations such as the Jones Act requirements, and improving the global trade environment.

Rising Oil Prices Predictably Drove Today's Unaffordability Problem

Today's higher food costs have their roots in the oil supply disruptions from the Middle East. Prior to the conflict with Iran, approximately 20 percent of the world's oil supplies were sourced from the Strait of Hormuz.[4] The conflict caused ship traffic through this vital passageway to come to a "near-standstill" significantly shrinking supply relative to demand.[5] When oil supplies decline relative to demand, gas prices should be expected to spike. It's the textbook result anyone who has taken an Econ 101 class would know. And this is precisely what happened.

Following the start of the conflict, oil prices in the U.S. spiked and, at their peak, were double the price that oil sold for in January 2026, see Figure 1. Figure 1 also illustrates the extreme volatility of oil prices since the conflict began. This volatility makes it more difficult for oil producers and gas retailers to manage their businesses, which jeopardizes capital investments and future output growth.

Figure 1
Oil Prices and Volatility Have Spiked Since the Iran Conflict Started
(WTI Spot Price Dollars per Barrel)



Source: Energy Information Administration

The price changes also work in reverse as Figure 1 also illustrates. Following the June 2026 signing of a Memorandum of Understanding (MOU) between the U.S. and Iran that could potentially end the conflict, oil prices fell significantly from around $90 a barrel to a bit under $70. This is a substantial price decline that could provide drivers with substantial relief at the pump – up to around 50-cents a gallon – if the price relief lasts. However, as of mid-July, the MOU was declared to be over by President Trump and oil prices have risen back up to nearly $80 a barrel as of July 24.

Regardless of whether the surge in prices continues, or another moderation occurs later in the summer, the cost implications from the conflict will likely persist. Consumers will continue to bear a higher cost because production does not turn on a dime. For oil and natural gas, it will take time before Middle Eastern production can return to previous trends. There are also higher risks associated with sourcing oil from the Middle East than before. These risks will be priced into the costs of oil, which will also cause higher prices to persist for much of 2026.

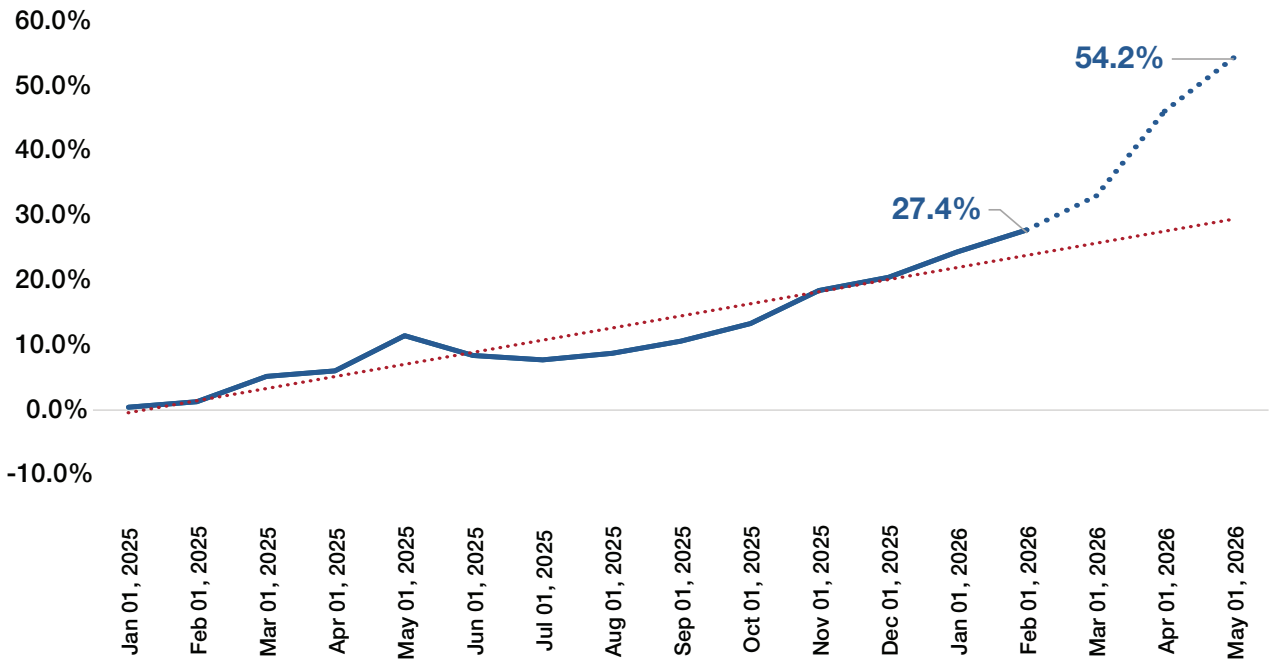
Rising gasoline prices don't just raise costs on families. The higher prices also increase the costs of transporting all sorts of goods and services, including food. Thus, the spike in oil prices indirectly raises the costs of our grocery bills by increasing food transportation costs. Higher energy prices also drive up the costs of producing food. Diesel fuel is used by the tractors, harvesters, and irrigation pumps that farmers heavily rely on. Higher diesel costs increase farmers' expenses, ultimately raising food prices further.

Low Fertilizer Output Is Also Driving Up Food Costs

The cost pressure on food goes beyond the rise in oil prices, however. Middle Eastern countries are major providers of petrochemicals used to create fertilizers and pesticides that are essential for producing our food. Approximately one-third of the globally traded fertilizers and fertilizer components passed through the Strait of Hormuz prior to the Iran conflict.[6]

The lost fertilizers and key ingredients used to produce fertilizers in other countries were interrupted precisely when the resources were needed for the Spring 2026 planting season. The result has been a spike in fertilizer prices, with some components rising by as much as 50 percent. These rising prices are now evident in the broader price indices, see Figure 2. Figure 2 documents the percentage growth in the price index for nitrogenous fertilizer manufacturing compared to January 2025. The red dotted line in Figure 2 demonstrates where fertilizer prices were headed prior to the conflict. The difference between the dotted portion of the blue line and the dotted red trend line demonstrates that fertilizer prices have accelerated (thus far) relative to the previous price growth due to the conflict in Iran.

Figure 2
Fertilizer Prices Are Up Over 54 Percent Since the Start of the Conflict in Iran



Source: BLS

The Sulfur Bottleneck

To fully understand this rising cost environment, it is essential to recognize that fertilizer is not one product but three — nitrogen, potash, and phosphate. Each component has its own supply chain and its own vulnerabilities.[7] Nitrogen depends on the use of ammonia, which is manufactured from natural gas processing.[8] Potash is mined, primarily in Canada.[9] Phosphate fertilizers, the workhorses of American grain production, depend on phosphate rock, ammonia, and sulfur.[10]

Access to sulfur has been particularly constrained as 50 percent of the world's seaborne sulfur was passing through the Strait of Hormuz prior to the conflict with Iran.[11] Compounding the problem, sulfur is produced as a byproduct of oil refining, natural gas processing, and metallic ore smelting. It is not independently manufactured, making it exceptionally difficult to ramp up domestic production on demand. Even as the world's second-largest producer, the United States still imports roughly 34 percent of the sulfur it consumes.[12]

A loss of sulfur also has an outsized impact on fertilizer shortages due to its role as "an important secondary plant nutrient and a critical input for producing sulfuric acid," which is essential for creating phosphate fertilizers.[13] In other words, "sulfur's central role" means that disruptions of sulfur supplies will have a significantly large impact on fertilizer prices.[14]

These consequences are being realized. The sulfur shortage has increased prices from its historical average between $100 and $300 per ton to more than $1,000 per ton.[15] The essential tripling of sulfur prices, along with the rising shortages, has idled the production of phosphate fertilizers to the detriment of global agricultural production.[16] Industry estimates suggest available global phosphate supply could fall 20 to 30 percent short of demand for the year.[17]

China's Market Distortions

Successive anti-trade actions by China – a major fertilizer producer – have worsened the global sulfur shortage. China suspended phosphate fertilizer exports beginning December 2025, which is set to last through August 2026. In mid-March 2026, Beijing then extended the restrictions to nitrogen-potassium blends and additional phosphate varieties. Effective May 1, Beijing then halted exports of industrial sulfuric acid altogether, a policy that is expected to last through the end of 2026.[18] As a consequence, between half and three-quarters of China's fertilizer exports are now off the market.[19] These lost global supplies create additional pricing pressures.[20]

In the meantime, higher fertilizer costs and less supply impede farmers' food production capacity, which reduces the global food supply and creates another price pressure point.

These impacts will likely be more severe in lower- and middle-income countries, but the U.S. will not be spared from the increase in food insecurity. Consequently, regardless of how quickly the production of fertilizers and fertilizer components rebound in the Middle East, continued food output shortages and price increases will persist for much of 2026.

The full implications from the lost fertilizer for food production are now working their way through the ag economy. As the Carnegie Endowment for International Peace noted, "farmers typically order fertilizer in March to apply in April or May."[21] Thus, the consequences for food production from the reduced fertilizer supplies is just beginning to impact consumers. Given the lag between when fertilizer is needed and when food is produced, global food supplies will remain constrained, and prices will remain elevated for quite some time even if fertilizer levels instantaneously returned to pre-conflict levels. Which they will not. According to the USDA, in light of these realities,

> ***in 2026, prices for all food are predicted to increase 3.4 percent****, with a prediction interval of 2.2 to 4.7 percent.* ***Food-at-home prices are predicted to increase 3.2 percent****, with a prediction interval of 1.3 to 5.2 percent.* ***Food-away-from-home prices are predicted to increase 3.5 percent****, with a prediction interval of 2.8 to 4.2 percent.* (emphasis in original)[22]

It is important to note that the crisis in the U.S. pales in comparison to the global consequences where the World Food Program fears that 363 million people are "at risk of acute hunger in 2026."[23]

Addressing Anti-growth Policies Can Improve Affordability and Reduce Volatility

It is in response to the rise in fertilizer prices, and their inflationary impact on food, that the FTC has announced their investigation. However, this investigation is not focused on the actual economic pressures raising food and energy prices. It will, consequently, fail to alleviate the affordability problems.

The good news is that policy changes can make a difference.

Repealing the tariffs that the Trump Administration has been implementing can potentially provide the quickest cost relief for families. Starting in February 2025, the administration has been imposing higher taxes on the food U.S. families consume through its erratic and piecemeal tariff policy. While most fertilizers are now not subject to tariffs,[24] tariff relief needs to remain in place long-term to help facilitate lower prices for these essential inputs into agricultural production.[25]

Repealing tariffs on food products and committing to a zero-tariff policy going forward, would provide immediate relief and provide the ag economy with greater certainty.

Making matters worse for consumers, according to the Tax Foundation, 52 percent of U.S. food imports still face a tariff even after the Supreme Court ruled that the majority of President Trump's tariffs were unconstitutional.[26] Disconcertingly, the president has announced new tariffs on 60 trading partners. Should they go into effect, these tariffs will worsen the cost of living problem. As an analysis from the New York Federal Reserve confirmed, nearly 90 percent of the costs of the tariffs are passed through to U.S. consumers further increasing food costs.[27]

Repealing tariffs on food products and committing to a zero-tariff policy going forward, would provide immediate relief and give the ag economy greater certainty. Lower costs and economic certainty would increase the ag industry's ability to invest and plan, as well as raise overall productivity. Consumers would benefit from a lower-priced, less volatile market for food.

In response to China's efforts to restrict global sulfur supplies, the U.S. should include these concerns in bilateral trade negotiations that facilitate a commitment to greater free trade from both countries. Ideally such an agreement would be broad based, however with respect to fertilizers, the negotiations should reduce market barriers for these essential products and their components.

Beyond removing trade inefficiencies, the U.S. fertilizer industry has had to manage an excessive regulatory burden that have been increasing costs on consumers for decades. These overly burdensome regulations constrain the supply of key components such as fertilizers and petrochemicals, which increase the economy's vulnerability to supply shocks.

For instance, the federal permitting process is notoriously long and costly, discouraging the development of domestic production capacity.[28] A report by S&P Global Market Intelligence, for instance, found that "the US has the second longest mine development times in the world, at almost 29 years on average from first discovery to first production."[29] Worsening the outcome, mines in the U.S. face higher litigation risks that further discourage domestic production.

Removing these regulatory barriers that create delays and increase production costs can boost supplies and reduce overall price volatility. Specific regulatory changes include comprehensive permitting and regulatory reforms that impose time limits on environmental reviews, enable concurrent agency evaluations, and enact legal reforms that reduce the incentives for frivolous lawsuits.

These reforms will shorten regulatory delays and lower companies' compliance costs. Reduced compliance costs will directly lower the prices for key inputs – such as oil and fertilizers. On a positive note, the Administration appears to recognize the importance of these goals. For example, the U.S. Department of Agriculture has accelerated the permitting process "for a major ammonia plant in Louisiana."[30]

Enshrining these reduced regulatory burdens into law would expand these benefits. The result would be greater fertilizer supply, reduced production costs, and lower prices for consumers.

Another worthwhile reform would repeal the Jones Act. This Act requires all ships transporting goods between U.S. ports to be built, owned, and operated by U.S. citizens. Studies demonstrate that it adds $200 million a year in unnecessary shipping costs.[31] For example, because of these mandates,

> *the cost of shipping a barrel of crude oil from Houston to Jacksonville is more than double that of shipping a barrel … from Montreal to New York/New Jersey, and the cost for shipping a barrel of crude oil from New Orleans to Los Angeles is more than four times that of shipping a barrel the comparable distance from Houston to London*.[32]

These higher costs inflate the prices for a wide variety of goods including food and oil. Removing these mandates will create a more flexible lower cost shipping system.

Conclusion

Collectively, bad policies decrease the U.S. economy's flexibility to adjust to supply shocks. These inherent rigidities have exacerbated the cost pressures created by the conflict with Iran. Launching a bureaucratic federal investigation is a distraction from the geopolitical conflicts and harmful federal policies driving the food affordability problem. Rather than launching investigations, policymakers should directly focus on the causal factors driving the current food affordability and security problems.

While sustainably resolving the Iran conflict is essential for achieving these goals, the ultimate resolution to these hostilities is complex and there is more than just economics at stake.

Other changes are more straightforward.

For instance, applying the broader regulatory reform efforts toward the fertilizer and minerals industries can improve the industry's flexibility while also reducing overall production costs. Repealing the tariffs that the Administration has implemented and directly engaging China with the goal of a durable trade agreement can provide sustained cost relief for strained consumers and improve the U.S. economy's durability against future supply shocks. The result will be lower food prices for families.

Rather than launching investigations, policymakers should directly focus on the causal factors driving the current food affordability and security problems.

Food affordability is a large and growing problem, but a formal FTC investigation is not needed. Basic economics demonstrates that when geopolitical conflicts and errant government policies constrain supplies, costs increase. Ignoring the clear economics does not change this reality. It only makes it more difficult to provide consumers with meaningful relief.

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About the Author

Wayne Winegarden, Ph.D., is a senior fellow in business and economics at the Pacific Research Institute.

Recognized as one of the country's leading free market economists, Winegarden writes briefs and commentaries and gives media interviews on the destructive impact of tariffs on American consumers, and the importance of federal and state policymakers embracing fiscal discipline.

Often cited by major national and international media outlets, he has been interviewed by the *New York Times*, *Wall Street Journal*, *Washington Post*, Associated Press, *USA Today*, BBC, CNN, CNBC, and CBS News, to name a few.

As director of PRI's Center for Medical Economics and Innovation, Winegarden spearheads research and advances policies that support the continued viability and vitality of the U.S. biomedical and pharmaceutical industries, such as how to fix America's broken drug pricing system, how price controls threaten innovation and limit access to life saving medications, and the promise shown by biosimilars. He travels the country giving speeches, providing invited testimony, and meeting with policymakers sharing his research and analysis.

Promoting free market environmentalism, Winegarden writes extensively on the negative impact of government green mandates on gas prices and production, electricity rates and grid reliability, and the energy burden of consumers, particularly in minority and low-income communities.

His paper, "Costly Subsidies for the Rich," received national attention for its finding that 79 percent of EV subsidies were claimed by those making more than $100,000 per year. Citing Winegarden's research, Sen. Deb Fischer (R-Nebraska) in August 2022 led the Senate in passing an amendment on a bipartisan vote to disallow electric vehicle tax credits for the wealthy.

Focusing on California's ongoing challenges brought about by irresponsible state policies, Winegarden writes in his monthly "Wayne's World" column for the Southern California News Group newspapers and PRI "Spending Watch" analyses about the state's ongoing budget problems, unfunded public employee pensions, and unacceptably-high cost of living.

One of the most prolific free market thinkers on the homeless crisis, he is a co-author of the 2021 book on California's homeless crisis, *No Way Home* (Encounter Books,) which was an Amazon.com number one new release for mental health law books. He is regularly interviewed by California media outlets, including Capitol Public Radio, The *California Post*, The *Center Square*, and The *San Diego Union-Tribune*, among others.

Winegarden is also the principal of an economic advisory firm that advises Fortune 500 companies, small businesses and trade associations on the economic, business and investment implications of economic trends. Previously, he worked as a business economist in Hong Kong and New York City and a policy economist for policy and trade associations in Washington D.C. Winegarden received his B.A., M.A., and Ph.D. in Economics from George Mason University.

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