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Hartman analyses American eating

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The largest single macronutrient increase in the American diet in the past fifteen years has been polyunsaturated fats, the company notes. Most famously, it includes the omega class of fats. These are the 'healthy' fats found mostly in nuts, seeds, fish, algae and leafy greens, virtually all of which are growing categories in the supermarket.

This is, it believes, due to the fact that consumers are gravitating toward 'natural' fats in

general and ones that do not come along with lots of carbohydrates (especially sugars).

This explains, in part, why monounsaturated fats are doing poorly. They are most commonly consumed by Americans in food forms that carry lots of carbs along for the ride: whole milk, whole-grain wheat, cereal and oatmeal (though some sources, like nuts and avocados, do not fit this pattern).

More interestingly, though, is the fact that total average per capita daily calorie intake has declined in the past fifteen years - and a lot of this decline originates from an overall decline in carb intake, especially sugar.

The American packaged food and beverage industry has built its business lines and brands on a business model predicated on high gross margin forms of carbohydrates and sugars (and fats), the company says, noting that this is a well-honed R&D technical competency.

But, says Hartman, it is not where food culture is trending.

Instead, the company finds that fibre and protein are growing along with polyunsaturated fats (most frequently consumed in fresher, less processed food forms).

It would appear that America's real nutrient intake, not just its retail grocery dollars, is shifting toward macronutrients that fight against the margin model of the industry...at least for now.

While the temptation, Hartman says, as has been seen with the explosion of everything protein, will be to simply develop highly processed forms of these on-trend macronutrients that fit the old margin model, the company cautions leaders to step back and appreciate the broader cultural context in which these nutritional trends are unfolding.

Highly processed food has already hit its volumetric peak, Hartman believes. Packaged food consumption overall is actually declining, and America is now in the process of recalibrating its collective diet within this context.

Those who can ride these unacknowledged nutritional trends through minimally processed forms (fresh and packaged) will be the real growth leaders in the next ten years, the company says, going on to claim that, “if you are a category like dairy, where both the good and the bad nutrients lurk, then innovate to rebalance the ratio in line with where the American diet is headed and you will probably do just fine.”

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