

# Modern macronutrients

A strategic guide to ingredient opportunities

**Hartman**  
GROUP



# The once-simple food pyramid has been replaced by a diverse, personalized set of nutrition beliefs

“Counting macros” used to evoke thoughts of bodybuilders, professional athletes and “extreme” dieters. While protein has become the darling of the food and beverage industry, dietary fats and carbohydrates have only recently started to emerge from their tumultuous pasts in American diet culture.

Thanks to shifting health priorities, diverse cultural perspectives and an expanding toolkit of functional ingredients, mainstream consumers increasingly understand the positive outcomes of optimizing protein, fat and carbohydrate consumption to achieve their personal health goals.

By strategically leveraging evolving health trends and consumer awareness, food and beverage companies have a unique opportunity to differentiate themselves through targeted marketing of high-quality protein, healthy fat and carb-conscious products that align with modern dietary preferences.



# Macronutrients are far more than nutrition facts on a label

These key elements help guide consumers' decisions in alignment with their personal food values and health aspirations.

For ingredient manufacturers and product formulators, understanding how perceptions of these essential nutrients are evolving is key to unlocking innovation opportunities, relevance and long-term growth.

# Evolving wellness culture is influencing consumer preferences

The value of personalization is growing, often starting with diets that focus on balancing specific macronutrients. Consumers have long rejected one-size-fits-all wellness regimens in favor of holistic approaches that support their unique definition of health.

Experimentation with various eating approaches is just one manifestation of these values. Popular modern diets like keto (low-carb, high-fat), plant-based (high-protein alternatives), and Mediterranean (good carbs, healthy fats) rely on macronutrient composition.

83%

of consumers agree diets should be personalized to meet individual health and wellness needs<sup>1</sup>

61%

of consumers have tried a specific eating approach in the past year (+6pts from 2023)<sup>1</sup>

1. [Health & Wellness 2025: The Interplay of Vitality and Longevity](#), Hartman Group

# Macronutrients are one key tool for evaluating healthfulness

As higher-order health aspirations like vitality and longevity rise in importance, a growing number of consumers are actively adding or avoiding specific ingredients in their diets. Protein (+12pts since 2023), “good carbs” like whole grains (+6pts since 2023) and fiber (+7pts since 2023) have been among the top ingredients added to consumers’ diets over the past decade.<sup>1</sup>

However, consumers rarely think about macronutrients in isolation. Instead, they view macronutrients as one important element of the equation for assessing whether a food is healthy or appropriate for their dietary approach. For instance, if a food is high in added protein but also appears highly processed, the health benefits will likely be perceived as diminished.

Consumers typically rely more heavily on either the ingredient list or nutrition facts, each representing a distinct approach to understanding what constitutes healthy food.

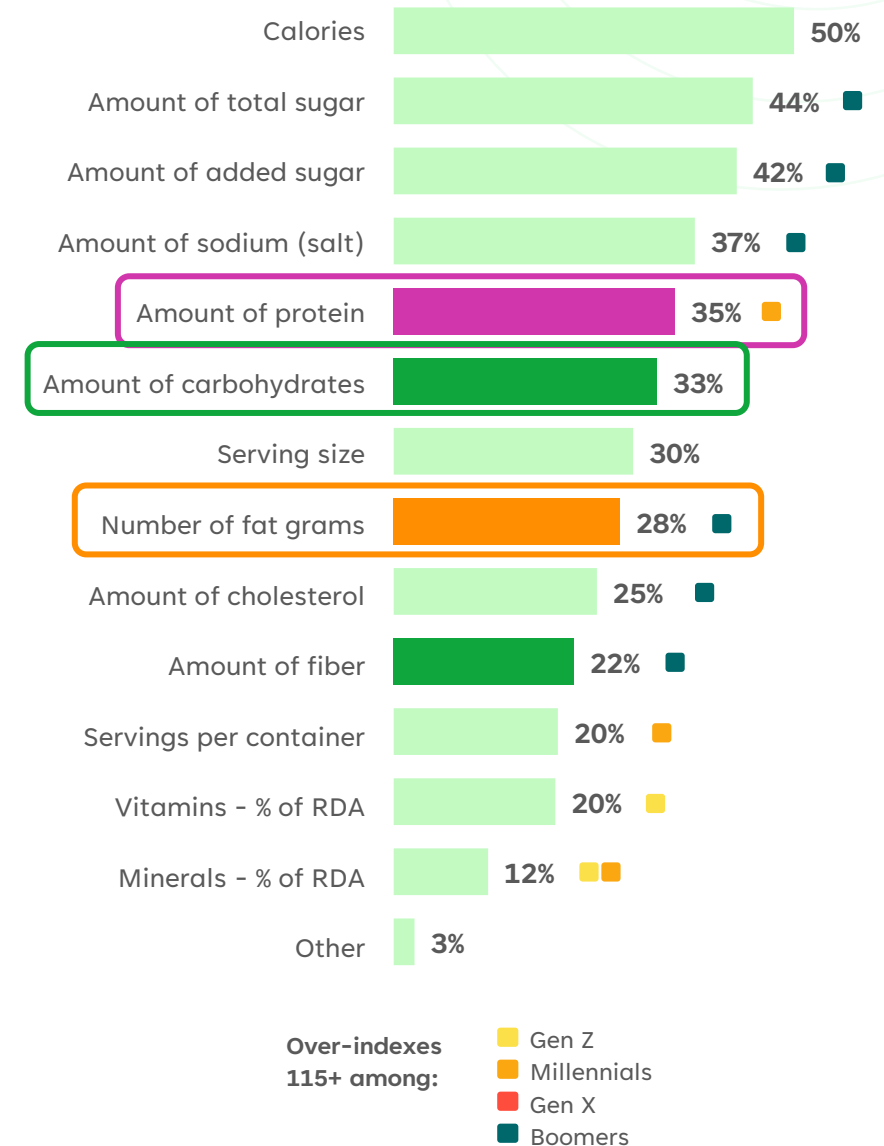
- **Analytical approach:** Does this product’s composition align with my needs?
- **Holistic approach:** Does this product seem “natural”?

**55%**  
typically consult the nutritional panel<sup>2</sup>

1. [Health & Wellness 2025: The Interplay of Vitality and Longevity](#), Hatman Group  
 2. [Modern Approaches to Eating 2022](#), Hartman Group

## Information sought from nutrition panels<sup>2</sup>

Among those who read the nutrition panel at least on occasion





MACRONUTRIENT CHEAT SHEET

# Protein

The modern high-protein craze has a storied history dating back to the post-World War II era. Once considered waste, excess whey from the booming dairy industry was repurposed in the 1970s thanks to membrane filtration technology that made its proteins usable and water-soluble.<sup>1</sup>

As food manufacturers sought new markets for this byproduct, cultural shifts helped drive mainstream demand for high-protein foods: from the *Pumping Iron*-fueled bodybuilding boom to the rise of “toned” female beauty standards and the popularization of the Atkins Diet.<sup>1</sup>

Today, protein is touted as essential for muscle maintenance, longevity and healthy aging by physicians and health influencers alike.

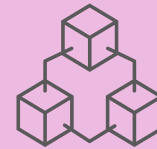
A growing number of consumers also view protein through ethical, environmental and digestive lenses—**asking not just *how much*, but *what kind, where from and what impact?***

1. [Big food gets jacked: How protein mania took over the American grocery store](#), GrubStreet, February 2025



## Consumer demand

Rising interest in fitness, weight management and overall vitality drives demand for high-protein diets



## Function

Proteins are essential for building and repairing tissues, supporting immune response and synthesizing enzymes and hormones



## Sources

Animal-based (meat, fish, eggs, dairy), plant-based (tofu, legumes, quinoa, nuts, seeds) and novel sources like insects and fermentation-derived proteins



## MACRONUTRIENT CHEAT SHEET

# Fat

The rise of low-fat foods in America can be traced back to the late 1960s and 1970s, when fat—particularly saturated fat—was blamed for rising rates of obesity and heart disease.<sup>1</sup>

By the 1980s, grocery store aisles were flooded with products positioned as healthy alternatives aligned with the era's increasingly thin-centric beauty standards, from skim milk to low-fat cookies.<sup>1</sup>

Despite lacking robust medical evidence, low-fat ideals became entrenched in popular culture, reinforced by fad diets and oversimplified public health messaging.<sup>1</sup> Ultimately, the low-fat ethos reflected deeper societal anxieties about weight, health and body image.

**Today, consumers are strategically embracing dietary fats, shifting focus from total fat *content* to fat *quality and function*.**

1. [The Rise of Low-Fat Foods in America](#), Culinary Institute of America, Spring 2023



## Consumer demand

Shift from "low-fat" to "good fat" consumption, particularly for brain health, heart health and overall satiety



## Function

Fats provide energy, support cell structure, transport fat-soluble vitamins and play roles in brain and heart health



## Sources

Good fats come from avocados, fatty fish, olive oil, nuts, seeds and some dairy products, whereas trans and saturated fats are more prevalent in processed or fried foods. Emerging functional fats include MCTs and omega-3s.



## MACRONUTRIENT CHEAT SHEET

# Carbohydrate

Despite being the human body's main source of energy, carbohydrates remain polarizing. Low-carb diets have been popular for over 50 years, accelerated by the Atkins Diet (yes, we're talking about it again), which claimed that carbs—not fat—were the primary driver of weight gain.<sup>1</sup>

Bestselling books like *The Zone*, *The South Beach Diet*, and later, *Paleo*, promised faster weight loss by reducing carbohydrate intake to moderate insulin production, further contributing to the popularization of low-carb eating.<sup>1</sup>

Today's consumers are turning toward fiber-rich carb sources like fruits and vegetables, ancient/sprouted grains and whole food starches (like sweet potatoes and legumes). **This cultural focus on fiber is helping shed the stigma that all carbohydrates are “bad” or “empty calories.”**

1. [Benefits of Low Carbohydrate Diets: a Settled Question or Still Controversial?](#), *Current Obesity Reports*, October 2022
2. [Inulin: properties and health benefits](#), *Food & Function*, April 2023
3. [Isomaltulose Exhibits Prebiotic Activity, and Modulates Gut Microbiota, the Production of Short Chain Fatty Acids, and Secondary Bile Acids in Rats](#), *Molecules*, April 2021

## Consumer demand



Popularity of low-carb eating styles for weight management, blood sugar control and specific diets/health conditions: GLP-1 diets, diabetes, PCOS and more

## Function

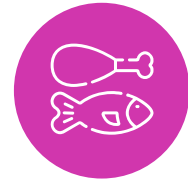


As the body's primary energy source, carbohydrates power brain and physical activity. Fiber—a non-digestible carbohydrate—is essential for digestive health and satiety.

## Sources



Whole grains, fruits, vegetables, legumes. Certain natural sweeteners like inulin<sup>2</sup> and isomaltose<sup>3</sup> are also being explored for prebiotic benefits, while refined and added sugars comprise the simple carbs that many consumers seek to limit.



## CASE STUDY

# Redefining Portable Protein

Stryve Foods is challenging the traditional meat snack category with its line of air-dried beef biltong and high-protein beef snacks. Positioned as keto-friendly, all-natural and preservative-free, each serving of Stryve's steak slices delivers more than double the protein of traditional beef jerky—and zero sugar. Unlike traditional beef jerky that is heat-dried, Stryve's products are slowly air-dried to maintain the meat's nutrient bioavailability and keep natural enzymes intact, resulting in a healthy and easily digestible form of protein.

New flavors and formats like Vacadillos Carne Asada and Original Brisket Slices support desires for variety and flavor exploration without sacrificing health benefits. Plus, the recent upgrade to grass-fed beef in several SKUs further differentiates the product, speaking to consumer demand for premium-quality protein sources with clean ingredients for optimized macros.

These factors have clearly resonated with consumers: Stryve (NASDAQ: SNAX) reported preliminary net sales of \$21 million for the 2024 fiscal year, an 18.5% increase from \$17.7 million in 2023.<sup>1</sup>

Brands innovating in this space should focus on preserving freshness without chemical additives, as well as flavor systems that can elevate minimally processed proteins. Suppliers who also offer transparent sourcing (e.g., grass-fed, hormone-free certifications) will stand out.

1. [Stryve Foods, Inc. Announces Preliminary FY 2024 Financials and Filing of Form 12b-25 to Extend Time to File FY 2024 Annual Report](#), Stock Titan, April 2025



## CASE STUDY



# Innovating for dietary preferences

Sprouts' Vegan Cheddar Grain-Free Crackers tap into the intersection of plant-based eating and innovative carbohydrate/fat sources. Cassava-based ingredients (cassava flour and tapioca starch) and avocado oil position this grain-free, gluten-free and vegan snack as a better-for-you cheese cracker replacement. With just 1g of sugar and no refined starches, the crackers can appeal to shoppers seeking blood sugar-friendly snack options that deliver nostalgic flavors.

Leveraging a healthy fat source like avocado oil not only differentiates the product from competitors using polarizing ingredients like seed oils, but it also exemplifies how private brands can deliver premium value by focusing on modern macronutrient priorities and specific dietary preferences.

Consumers increasingly understand that “grain-free” doesn’t mean carb-free—but they’re open to carbs when the source is purposeful and minimally processed. This product aligns with evolving perceptions that healthy carbs and quality fats can coexist, especially in snack formats that feel both indulgent and intentional.

# Team discussion questions

1

What macronutrient-related health and wellness goals—like higher protein, lower carbs, or healthy fats—matter most to your consumers, and how effectively are your products meeting those expectations through **branding, benefits and communication**?

2

Which macronutrient platform—such as high-protein, low-carb, or healthy fats—represents **the most credible opportunity for your brand** to differentiate in the functional food space while capturing meaningful growth potential relative to competitors?

3

How can your brand more effectively articulate macronutrient-related benefits to **build consumer trust and overcome skepticism** in an increasingly discerning marketplace?

4

As consumer focus expands from protein to include dietary fiber—driven by gut health and chronic disease prevention—**how is your brand leveraging innovation to incorporate fiber into products** and position it as a key differentiator in your product portfolio?

# Strategic insights



## Own a functional nutrition position

Position your brand as a credible source of functional nutrition, leveraging existing consumer trust in key nutrients.



## Cue key benefits

Simplify communication on labels and in marketing to clearly connect macronutrient content to real-life benefits like sustained energy, satiety or recovery.



## Protein as a performance driver

From convenient breakfast options and functional snacks to dairy products, frame protein as a tool for weight management, muscle/strength repair and maintenance, immune support or satiety between meals.



## Balance carbs for functionality

Highlight complex carbs (e.g., whole grains, legumes) for energy and fiber, or minimize simple carbs to appeal to low-carb and clean-eating trends.



## Good fats as essential, not optional

Highlight the benefits of healthy fats—like cognitive support and hormone functionality. Use ingredient transparency (e.g., olive oil, almonds, pumpkin seeds) to build trust and modern appeal, especially in products where fat quality can be a differentiator.



The macro in “macronutrient” reflects not just the scale of biological importance, but the scale of opportunity.

For ingredient companies and food & beverage manufacturers, this isn’t a trend to watch—it’s an invitation to lead.

By developing ingredients that align with evolving consumer priorities and partnering with brands on narrative-driven innovation, companies can help shape a more dynamic, personalized and trustworthy food future.

# Let's build together

With over 30 years of expertise in the U.S. wellness market, our team can help identify the most salient opportunities for your business to better support modern macronutrient priorities.



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## ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients. Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

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