



Corbion

TORTILLAS IN THE AGE OF GLP-1: WHAT YOU NEED TO KNOW

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Speaker Overview

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Marketing Manager at Corbion

- ✓ Bakery scientist turned marketer
- ✓ Passionate about turning consumer data and behavior into actionable insights
- ✓ Girl mom to 2 tiny humans who also love carbs and spending time in the kitchen



Presentation AGENDA

01

GLP-101 and Market Trajectory

02

How GLP-1 Changes Eating Behavior

03

Implication for Tortillas

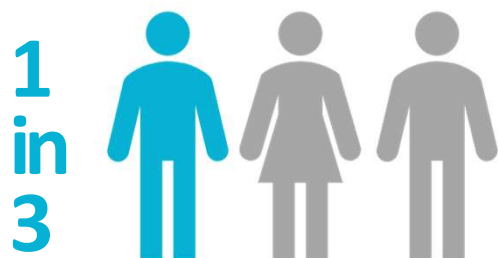
04

Action Plan for Future Development

GLP-101 and Market Trajectory

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Consumers are taking steps to prioritize health



US consumers have taken much or a great deal of action to live healthier in the past 12 months



Top 5 Primary Health Goals

1 Mentally/emotionally well (35%)

2 Weight loss (27%)

3 Prevent diseases (19%)

4 Vitality and energy (18%)

5 Body positivity (17%)
Look fit (17%)

All are positively impacted by a GLP-1 medication

The start of a health care revolution

40% of Americans are currently trying to lose weight

44% of Americans are interested in taking a prescription drug for weight loss

Interested persons are interested in not just losing weight but they also want to...



“Feel better about myself” (48%)



“Look better” (40%)



“Eat healthier” (41%)



“Improve heart health” (36%)

What are GLP-1 medications?

Medications that mimic the effect of the GLP-1 hormone that balances blood sugar and delays gastric emptying to signal the brain to create the feeling of fullness

Current options on the market

Semaglutides
(ex. Ozempic,
Wegovy)

**Compound
Medications**
(ex. Hers)

Tirzepatide
GLP-1 + GIP
(ex. Mounjaro)



The rise of GLP-1 medications

In 2028, an estimated 70 million people will be taking GLP-1 medications to treat conditions beyond obesity.



With the use of GLP-1 medications we are seeing improved health outcomes in



Weight loss and obesity



Reduced risk of heart disease



Stroke and Alzheimer's prevention



Addiction reduction



Improved mental health

Insight into the GLP-1 user



Over **8 out of 10** current users report having a **positive experience** taking a GLP-1 medication



It's been amazing. It helps suppress my appetite and I don't eat like I used too. I've lost 35 pounds and still going in the right direction.



It's helped me lose weight and keep my appetite under control – I feel much better.




I have overall improvement with my health. I was able to do my first 10k last week.



How GLP-1 Changes Eating Behavior

GLP-1 impact on food consumption



77% of respondents
report a **decrease in food
consumption** since starting
a GLP-1 medication

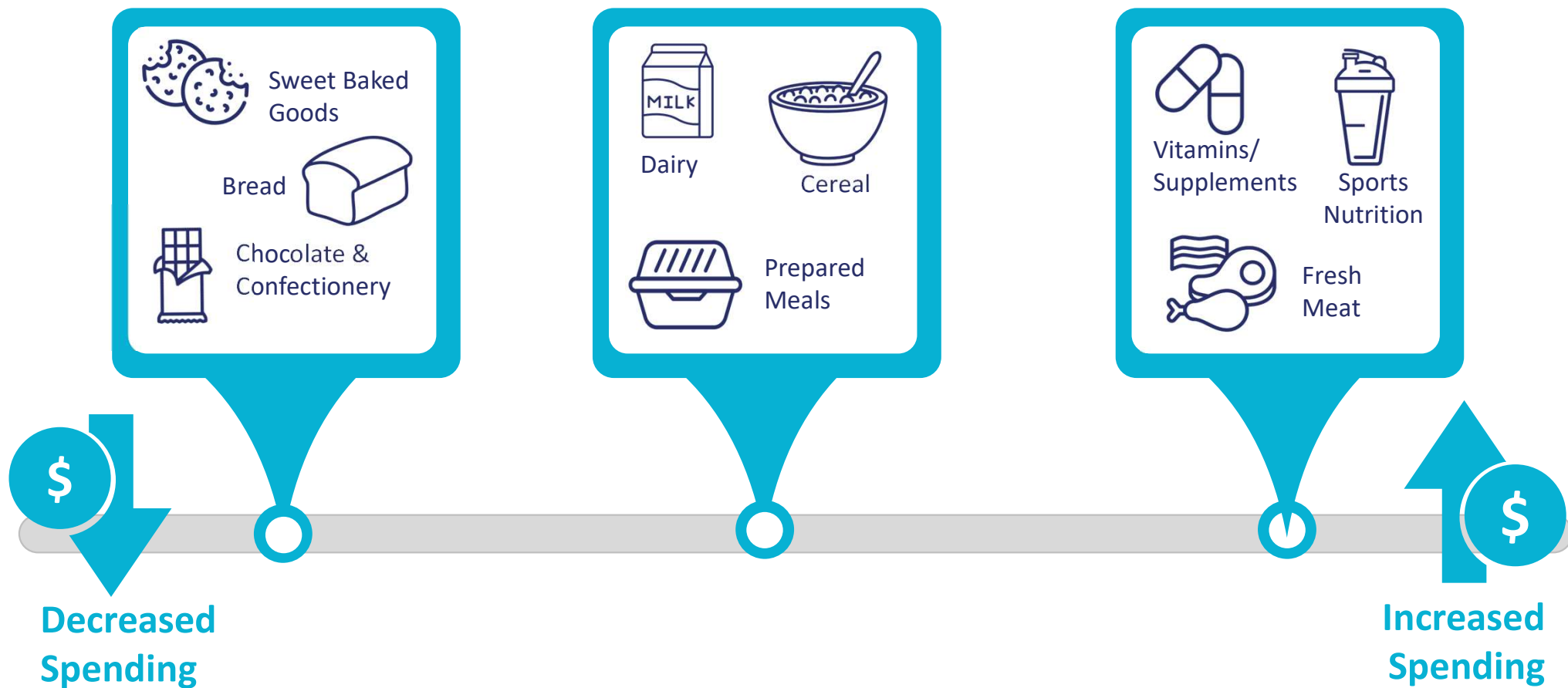


What is contributing to the decrease?

Consumers are:

- 1. Eating fewer meals & snacks throughout the day**
- 2. Consuming less at each sitting**
- 3. Changing their meal composition**

GLP-1 impact on various food categories



Change in spending habits in the declining categories

GLP-1 users aren't leaving the category

GLP-1 users are still purchasing baked goods, they're just purchasing them differently than before.



GLP-1 users report becoming more aware about what they consume



Ingredient Aware

They're evaluating nutrition labels for:

1. Protein
2. Calories
3. Sugar
4. Carbohydrates
5. Total Fats



Claim Aware

They're evaluating packaging claims for:

1. High in protein
2. Low in sugar
3. Free from additives
4. No added sugar
5. Contains recognized ingredients



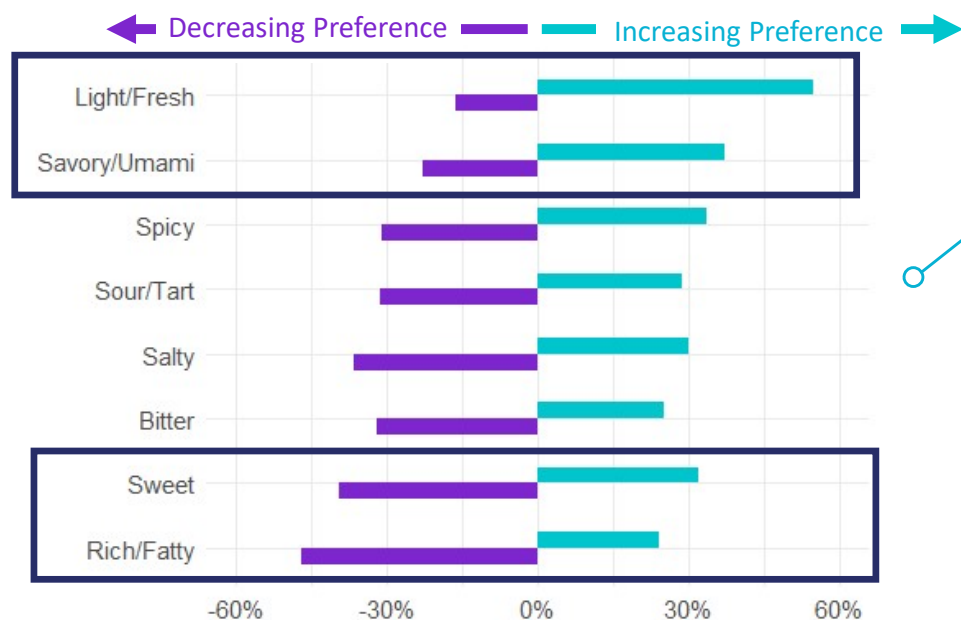
Nutrient aware

They're seeking supplements to control negative side effects:

Multivitamin
Vitamin D
Vitamin B12
Omega 3 Fatty Acids
Prebiotics/Probiotics

Users of GLP-1 medications report a shift in flavor preferences

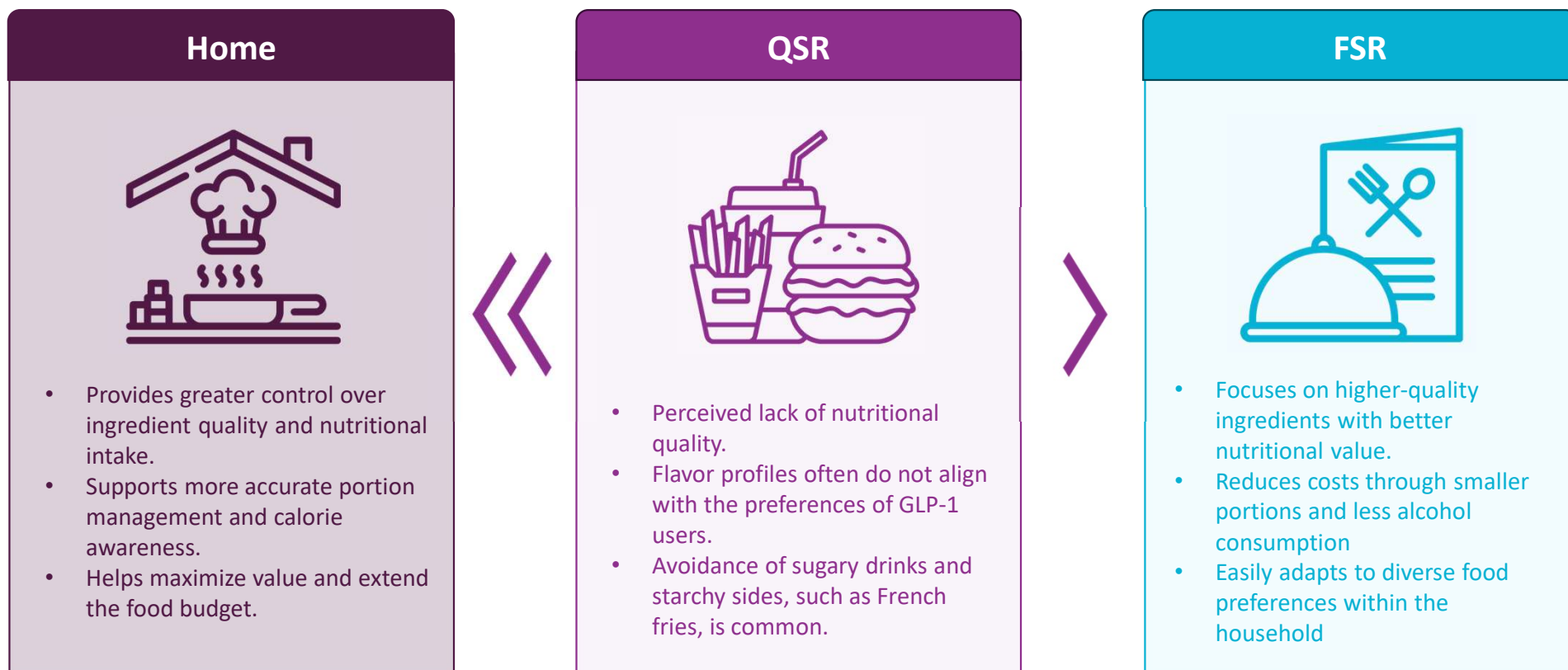
How Flavor Preferences have changed on GLP-1



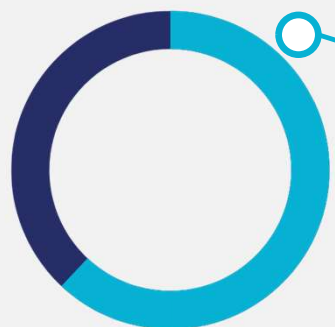
Top 5 Flavor Combinations of GLP-1 Users

- 1 Light/Fresh & Savory/Umami
- 2 Sweet & Salty
- 3 Light/Fresh & Sweet
- 4 Sweet & Spicy
- 5 Savory/Umami & Spicy

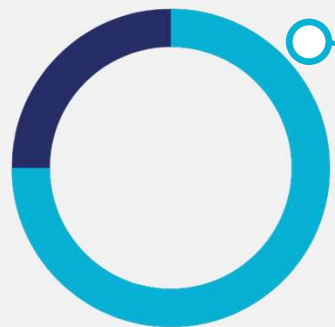
Changes in Eating Habits - Location



GLP-1 Users are Typical Single User Household



62% of GLP-1 users report always/often **modifying meals** or **cooking a separate meal** for themselves at family mealtimes.



75% of these respondents say this has **significantly increased** the time they spend cooking.



There is a significant need for easy-to-use and convenient options to reduce the time it takes to make separate meals, and there is also a need for options that can be enjoyed by the entire family and not just one user

Implications for Tortillas

With all the changes happening amongst GLP-1 users, how do tortillas fit the bill?

1

Tortillas are the number one alternative to packaged bread

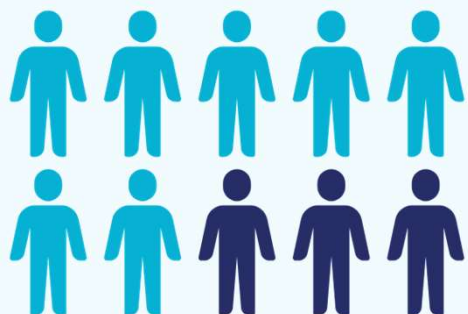
2

GLP-1 users need smaller portion sizes and tortillas provide carbohydrates in a more approachable portion

3

Tortillas are a versatile carrier and GLP-1 users are concerned both about waste and convenience

Where do we see gaps in what's on the market for GLP-1 users?



68% of current and former GLP-1 users say their food needs **are not being met** by the market

What are they missing?

- Lack of fresh prepare options or **convenience** outside of frozen/grab n go.
- Education and ways to decrease mental load. Healthy, **trusted ingredients**.
- Options for **better gut health** food gentler on digestion



“There’s a need for more low-carb, low-sugar, and high-protein snacks and **meals that are easy to grab or prepare**. Convenience and taste matter.”



Portion-controlled, high-protein, low-sugar, **digestible**, convenient, balanced, satisfying, **gentle**.



Innovate for the GLP-1 Consumer

Portion size

1

Prioritize satiety in smaller portions

2

Look at multi-packs or single serve options to reduce waste

In the marketplace:

Smaller individual portion sizes



Smaller full pack sizes

Innovate for the GLP-1 Consumer

Prioritize nutrition and ingredients

- 1 Formulate with key nutrient needs like protein and fiber
- 2 Avoid undesired and not easily recognizable ingredients
- 3 Evaluate line extensions for low-carb or low-sugar

In the marketplace:

Specialized claims for essential nutrients

Callouts for key nutrient areas like protein and fiber



Innovate for the GLP-1 Consumer

Labeling and key messages

1

GLP-1 users are likely to read nutrition labels and evaluate on-pack claims to meet their dietary needs

2

There's an opportunity to get creative with claims and marketing messaging that target this specific user group

In the marketplace:

Prioritizes callouts for focus nutrients like protein and fiber

Easily recognizable claim for GLP-1 users



Innovate for the GLP-1 Consumer

Flavor and food preferences

- 1 GLP-1 users prefer umami and savory versus sweet
- 2 They will be consuming less rich and fatty foods so think about pairings for light and fresh

Leaning into spicy and umami to meet the changing flavor preferences



Action Plan for Future Development

Key Overall Takeaways for GLP-1

1

GLP-1 medications are worth paying attention to

Medication usage is growing and becoming more accessible showing us that GLP-1 medications are not a fad and for many usage could be long-term.

2

GLP-1 users have not left but they are shifting their bakery spend

Even though consumption is trending down, these users are not completely foregoing baked products. However, when and how they purchase is changing.

3

Innovating for this consumer group should be targeted

The GLP-1 consumer has specific needs and requirements they need their foods to meet. To reach this consumer, we must innovate and develop products that align with their new nutrient needs.

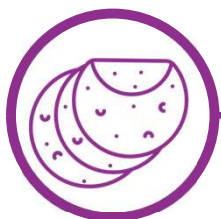
Three Take-Home Questions



01

Where can you fortify or boost nutrition?

Identify areas to add fiber or protein to provide essential nutrients or go all in with low-carb.



02

Could you evaluate packaging size or product format for proper portion sizes?

Look for ways to package product in smaller quantities or provide alternative flavors in the smaller formats.



03

How will you use packaging to educate and provide helpful information?

Packaging claims can be helpful for GLP-1 users to give them an easy purchase decision that meets their needs.

THANK YOU

Are you ready for the GLP-1
consumer revolution?

Download our full GLP-1
consumer toolkit using the
QR code





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