



GLP-1 Medications: Driving Change

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Objectives



Understand what a GLP-1 agonist medication is, how it works, and what is driving the growth in GLP-1 prescriptions.



Understand nutrition considerations for GLP-1 medications.



Review GLP-1 consumer behavior for spending.



Discuss current innovation and future needs and opportunities in the food industry.

Health of Americans, Rise of GLP-1 Medications.

What is a GLP-1 agonist?

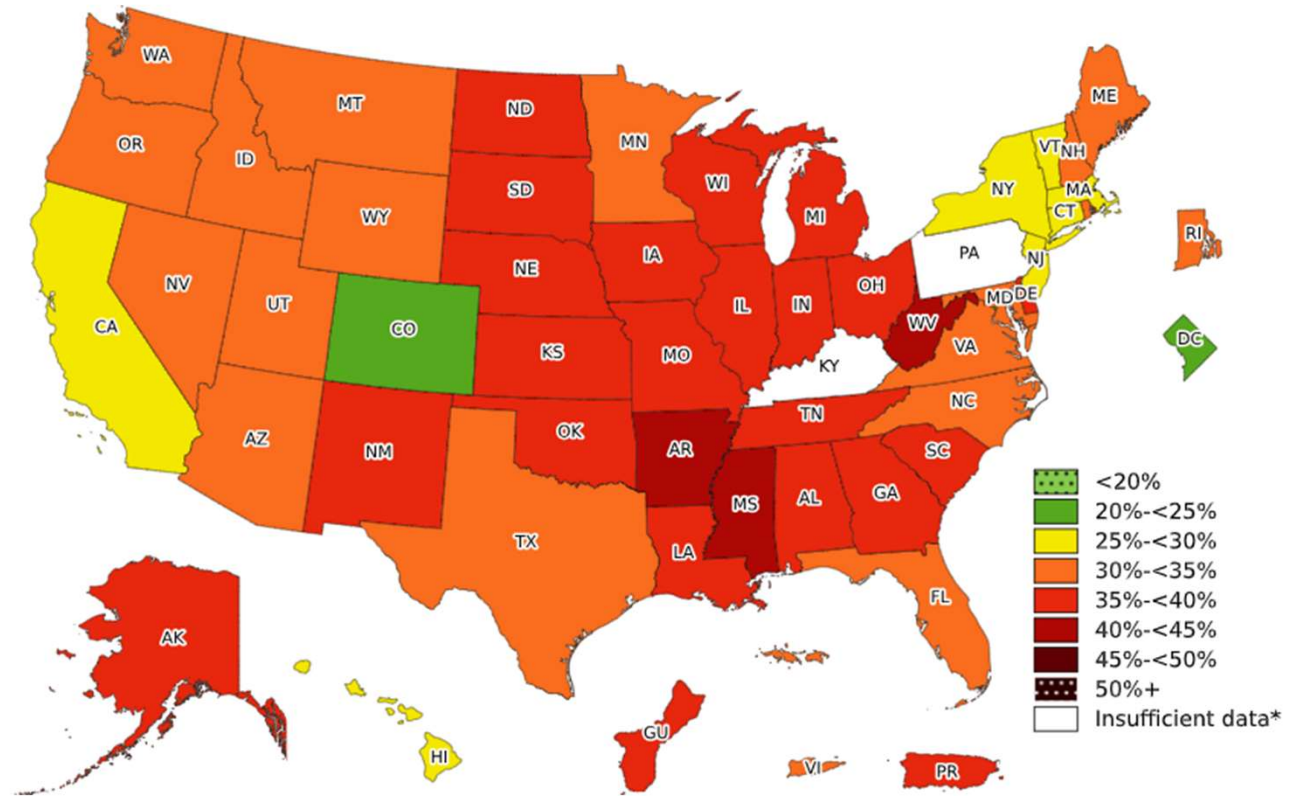
Glucagon-like peptide-1 agonists are a class of medications used to treat Type 2 diabetes but have also been found to support weight loss and reduce the risk of heart attack and stroke.



On average 40% of U.S adults are obese

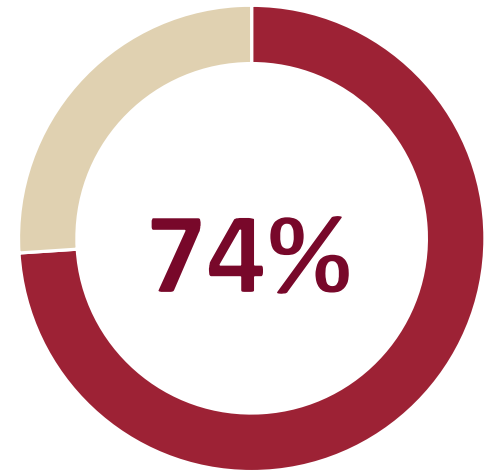
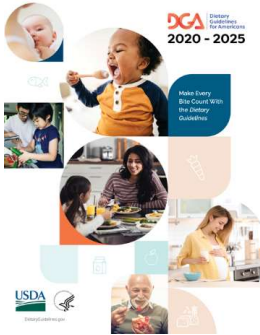
U.S. Adult Obesity Prevalence

23 states exceed 35% obesity rates



The Health of Americans

6 IN 10 ADULTS
are living with one or more
diet-related chronic diseases

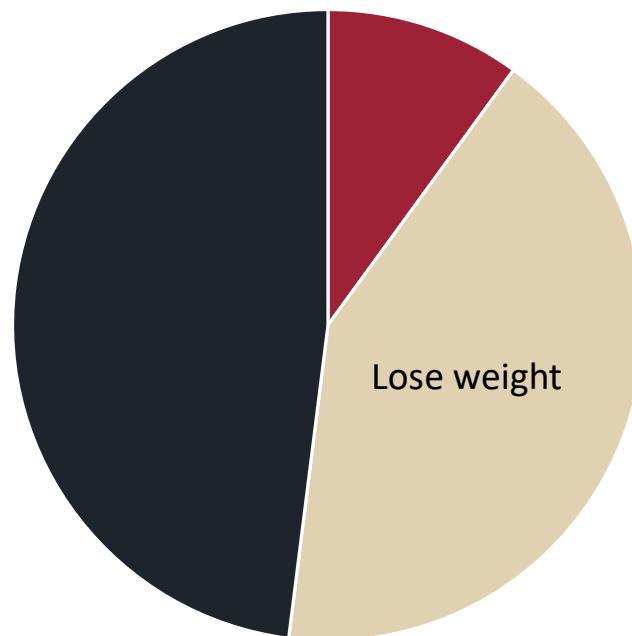


of American adults are
overweight (BMI 25-29.9) or
obese (BMI \geq 30)

Dietary Guidelines for Americans, 2020-2025

4 in 10 Americans are currently trying to lose weight.

Almost half of Americans (48%) are trying to maintain their current body weight.



■ Gain weight ■ Lose weight ■ Maintain my current weight ■

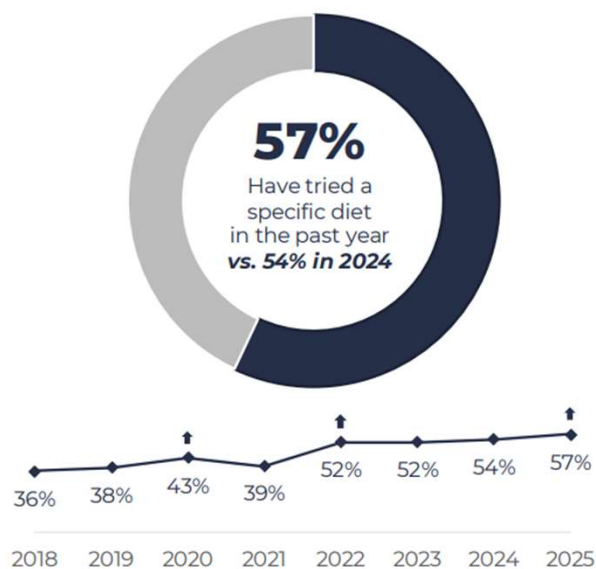
Q2. What are you currently trying to do about your body weight? (n=1000)

IFIC Spotlight Survey: Americans' Perceptions of Obesity Medications. January 2025.

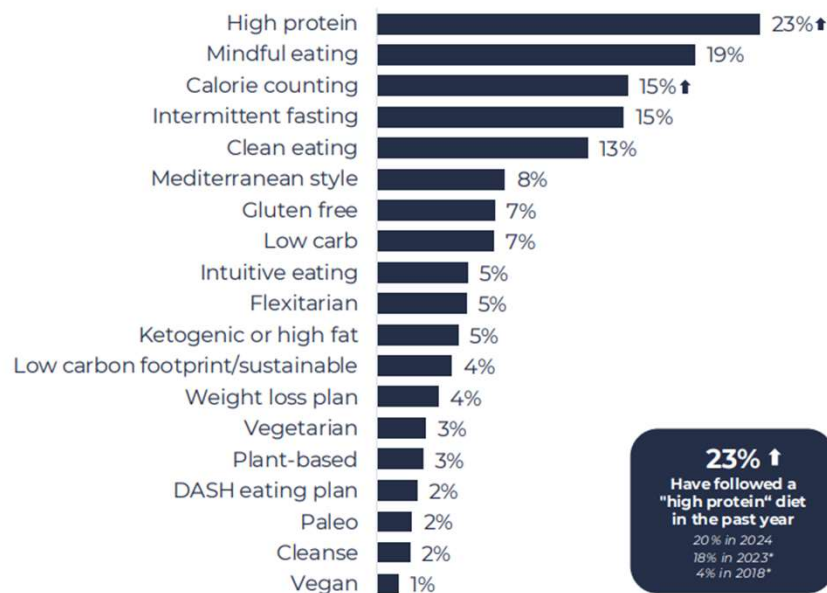
Nearly 6 in 10 Americans report following a specific eating pattern or diet in the past year, a rising trend since 2018.

For the third straight year, “High protein” is the most common diet that Americans are following.

Followed Eating Pattern/Diet in Past Year



Followed Eating Pattern/Diet in Past Year



23% ↑
Have followed a "high protein" diet in the past year
20% in 2024
18% in 2023*
4% in 2018*

Use of GLP-1s in America



12%

1 in 8 Americans
have used GLP-1s



16 million

Americans are taking GLP-1s (5%)
with demand on the rise

Obesity rate in U.S. dropped to 37%, driven by increase in GLP-1 use.

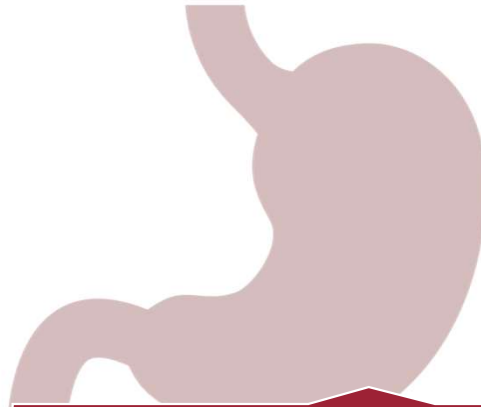
<https://news.gallup.com/poll/696599/obesity-rate-declining.aspx>

**GLP-1 Medications:
How they work, nutrition
considerations.**

GLP-1 Medications: How They Work



Increased Insulin Secretion



Delayed Gastric Emptying



Increased Satiety

GLP-1s: work by improving blood sugar, slowing digestion, and curbing hunger.

GLP-1 Medications: Top Nutrition Concerns



Muscle Loss



GI Issues



Micronutrient Gaps

Top Concerns

Weight loss =
water loss + fat loss + lean mass

Lean mass helps maintain
metabolic rate, minimizes risk of
osteoporosis, falls, and injuries.

Side effects include nausea,
vomiting, diarrhea, and
constipation.

Increased risk for vitamin and
mineral deficiencies with
decreased intakes.

Nutrition Considerations

Prioritize high quality **protein**,
ideally in **20-30g** increments.

Avoid high fat foods, eat **small, frequent meals** to help with
nausea and vomiting.
Increase **dietary fiber** and
hydration to help with diarrhea
and constipation.

Focus on Vitamin A, D, E, C, B
vitamins, calcium, magnesium,
and zinc; aim for **nutrient
dense** foods.

**Behavior changes:
Purchase preferences and
spending.**

GLP-1 Behavior Changes



Confused about what to eat



Unclear how to manage side effects



Frustration by focus on what NOT to eat



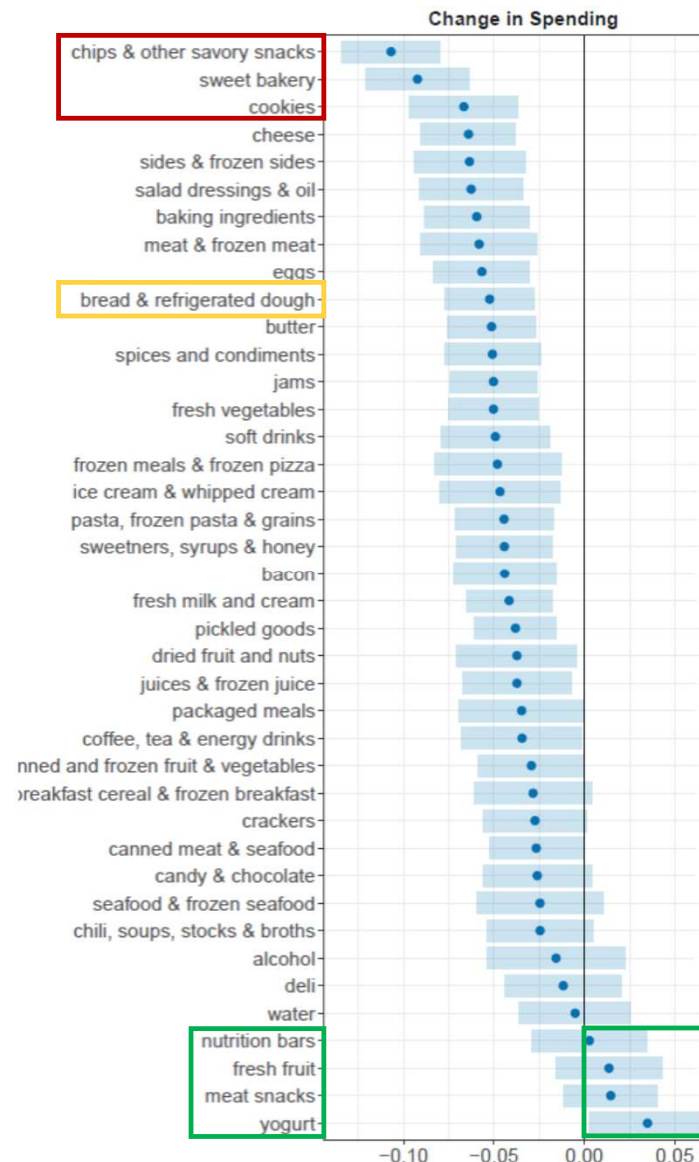
Difficulty adapting meals for family and social settings

While there is some initial confusion and frustration, most users experience a shift in eating patterns and spending. Per household, a 5.3% decrease in grocery spending is seen within the first six months.*

*Households earning over \$125,000 annually reduce their grocery spending by 8.2%

“The No-Hunger Games: How GLP-1 Medication Adoption is Changing Consumer Food Demand (December 27, 2024)”. Cornell SC Johnson College of Business Research Paper, <http://dx.doi.org/10.2139/ssrn.5073929>

Changes in Grocery Spending Six Months Post GLP-1 Adoption by Category



- Report shows category-level spending changes in the first six months following GLP-1 adoption for the 40 largest grocery categories.
 - Declines across the majority of product categories, including staples such as meat, eggs, vegetables, and bread, suggesting decreases in overall food volume.
 - Only four categories show estimated increases in spending: nutrition bars, fresh fruit, meat snacks (e.g., meat sticks), and yogurt.

GLP-1 Medications: The Ripple Effect



8% Decline in spending on food away from home

GLP-1 consumers don't just change what's on their plate, they create a domino effect.

- Cook differently for the family
- Family celebrations change
- Spending less on food away from home

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**Manufacturers have an
opportunity to adapt and
innovate their portfolios.**

Implications and Opportunities for Food Industry



Leverage current SKUs that have potential to offer solutions for GLP-1 users.

Focus innovation on portion-controlled, grab-and-go, nutrient dense offerings.



Smaller Portion
Sizes



Convenience

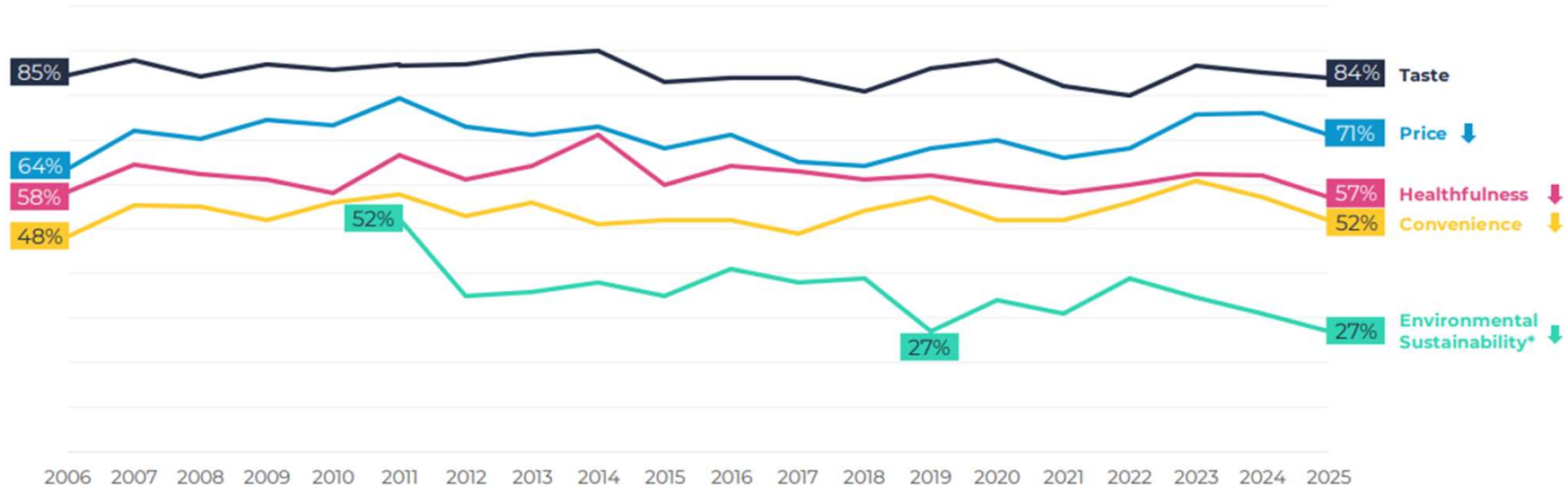


Mindful
Macronutrients

Taste is the top purchase driver.

For 20 consecutive years, Americans have considered taste a stronger driver of food and beverage purchases than price, healthfulness, or convenience. Since 2011, environmental sustainability has consistently ranked below these factors.

Food and Beverage Purchase Drivers Over Time
(% 4-5 Impact out of 5)



GLP-1 Influence: Marketplace today.

Some companies are addressing the needs of GLP-1 users with new products and targeted claims.



Formulate to Targeted Attributes and Claims



Simple



Portion
Controlled



Nutrient Dense



No Added
Sugars



Whole Grains



Fiber



Net Carbs

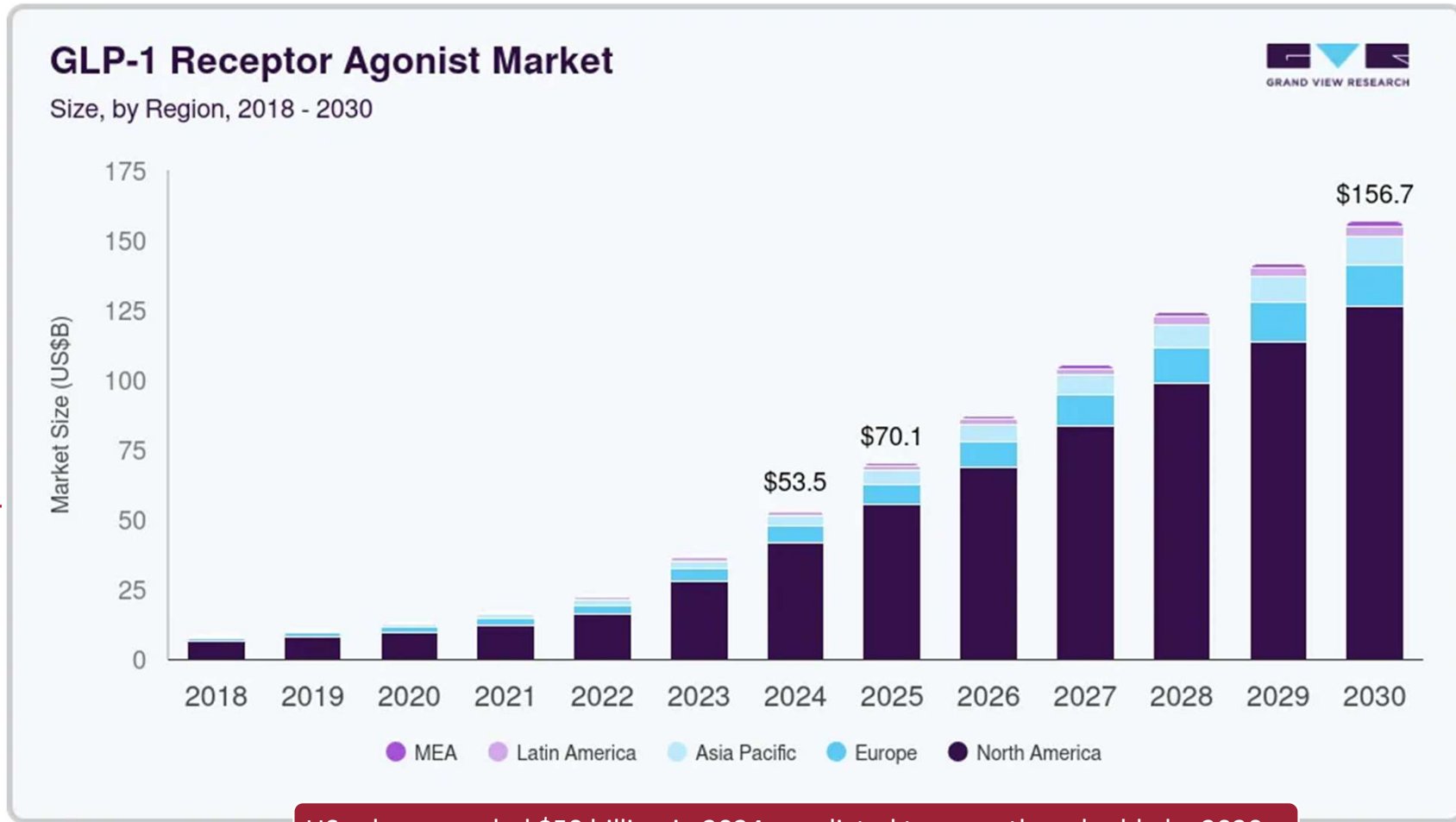


Protein

Nutrient dense products are in high demand due to reduced calorie intakes.

Future of GLP-1 Medications

GLP-1
use
expected
to rise



US sales exceeded \$50 billion in 2024, predicted to more than double by 2030

[GLP-1 Receptor Agonist Market Size & Share Report, 2030](#)

Questions?