



GLP-1 Trends in Tortillas

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Objectives



Understand what a GLP-1 agonist medication is, how they work, and the growth in prescriptions.



Understand nutrition considerations for GLP-1 medications.



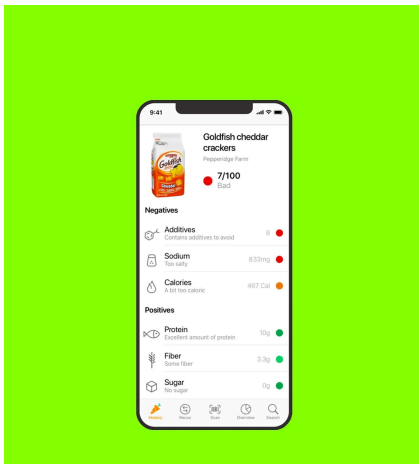
Review GLP-1 consumer spending behaviors.



Discuss trends and innovation opportunities within the food industry.

Current Nutrition Environment, Influence on Products and Claims.

Market Influence and Industry Opportunities



Food Scoring Apps

- Yuka
- Food Health
- Consumers are using to quickly assess



Dietary Guidelines for Americans

- Less refined grains
- Less added sugars
- More protein



Maxxing Mentality

- Fiber maxxing
- Protein maxxing
- Hydration maxxing



GLP-1 Medications

- Shifting habits with the rise of GLP-1 and other weight loss medications

Health of Americans, Rise of GLP-1 Medications.

What is a GLP-1 agonist?

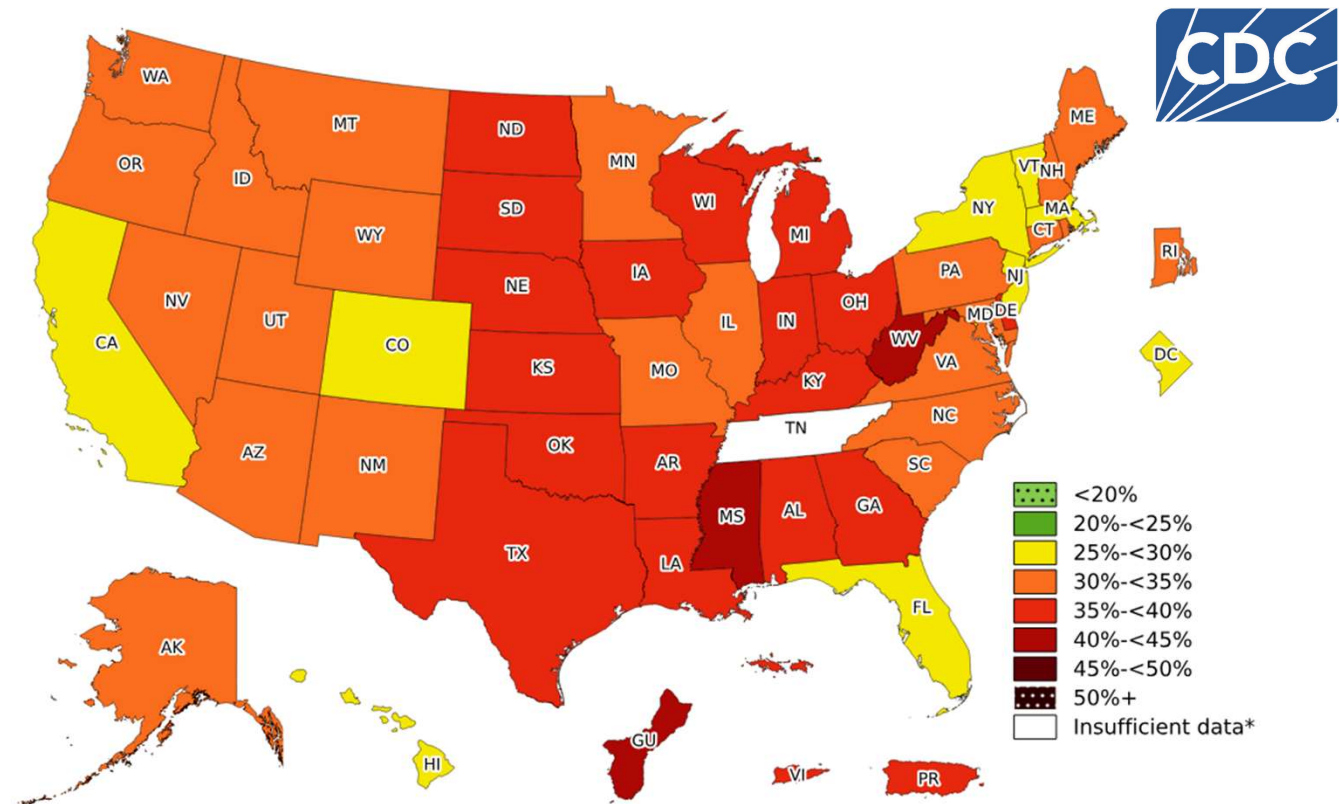
Glucagon-like peptide-1 agonists are a class of medications developed to treat Type 2 diabetes but have also been found to support weight loss and reduce the risk of heart attack and stroke.



U.S. Adult Obesity Prevalence

23 states exceed 35% obesity rates

On average 40% of U.S adults are obese

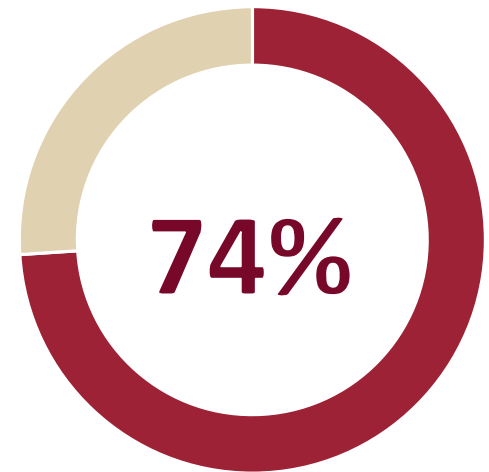


The Health of Americans

3 in 4 Americans
are living with one chronic disease



[About Chronic Diseases](#) | [Chronic Disease](#) | [CDC](#)



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

Use of GLP-1s in America

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



24%

households

10.1% Lapsers

65.7% Never Used



Demand for GLP-1s
is on the rise.

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

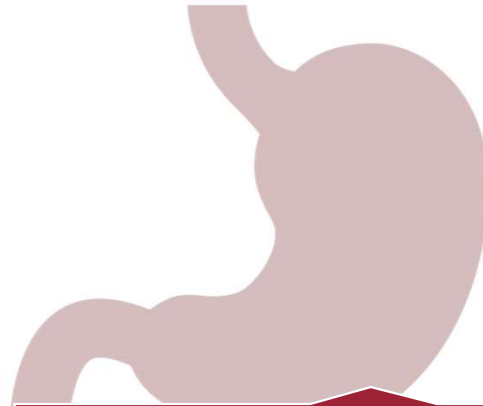
Source: Numerator GLP-1 Hub Apr 2026 Wave; Apr 2024-Apr 2026 trend; GLP-1 Syndicated Survey Jan 2026.

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

GLP-1 Medications: How They Work



Increased Insulin
Secretion



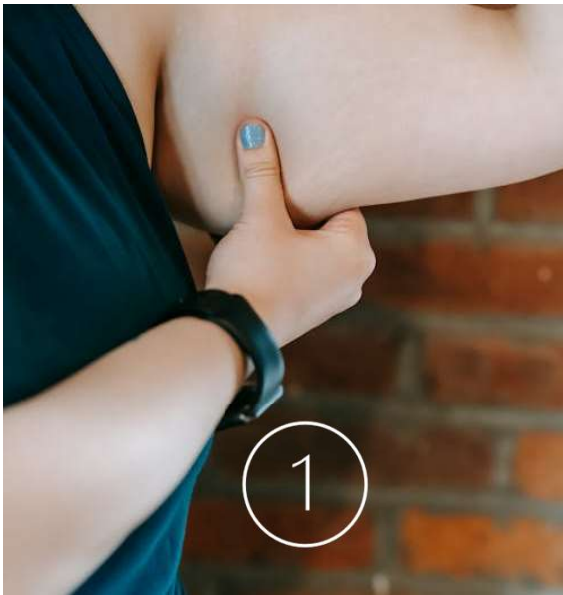
Delayed Gastric
Emptying



Increased Satiety

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

GLP-1 Medications: Top 3 Nutrition Concerns



Muscle Loss

Lean mass declines with weight loss

30g protein
per meal



GI Tolerance

Slower digestion, N/V/D + constipation

Lower fat, smaller portions,
fiber + fluids



Micronutrient Gaps

Risk for vitamin/mineral shortfalls

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



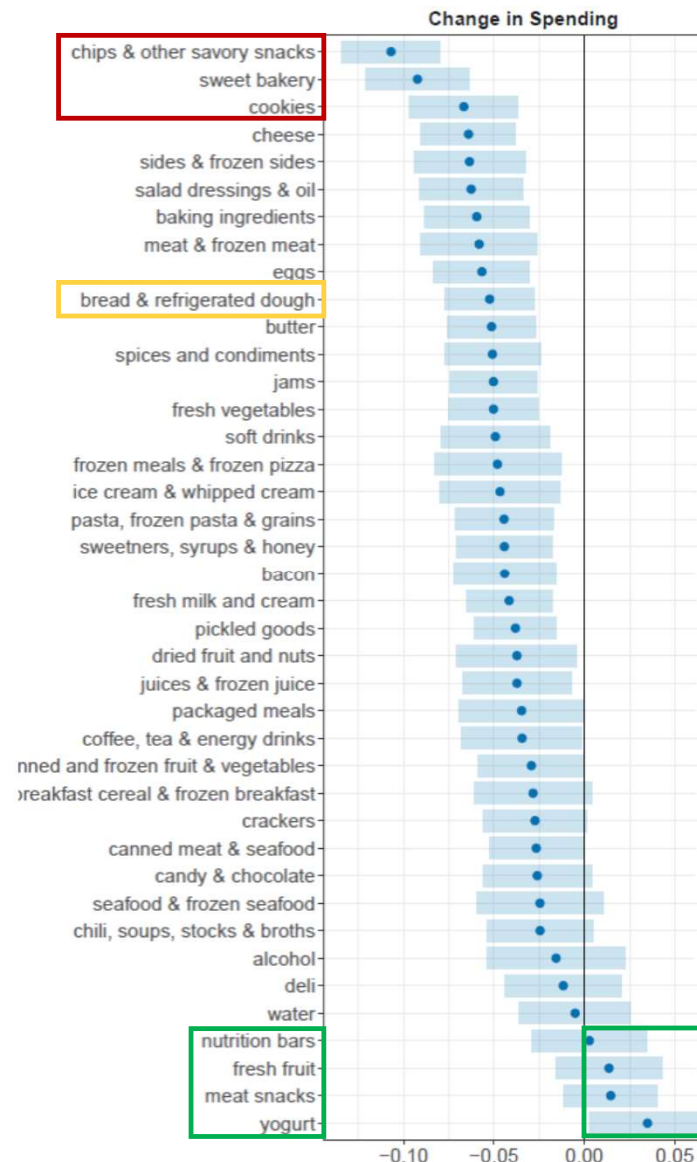
Difficulty adapting meals for family and social settings

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.

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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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GLP-1 Medications: The Ripple Effect

Impact of Dietary Changes to HH

By Total GLP-1 Users

Displaying % for 'My family has also adopted this change' + 'My family has somewhat adopted this change'



Source: Numerator GLP-1 Survey
Q15_ And how, if at all, have your dietary changes impacted your household?
Base: Total (n=2,113)

Challenges, changes, and
purchase intent.

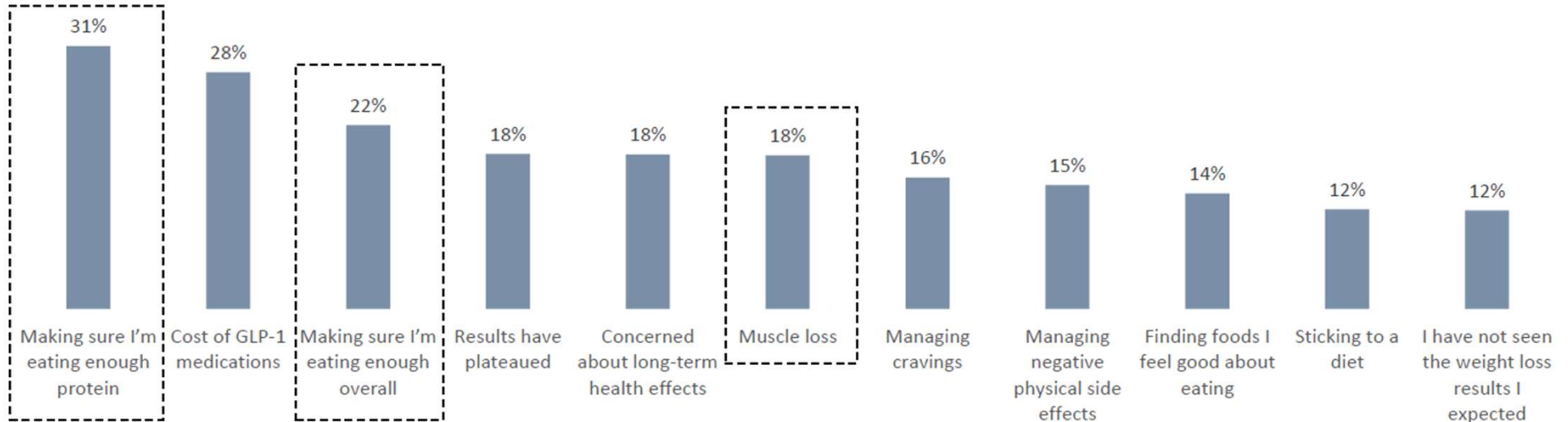
Protein Is Important for GLP-1 Users

What have been the biggest challenges of taking GLP-1 medications?

Biggest GLP-1 Challenges

By Total GLP-1 Users

■ Total



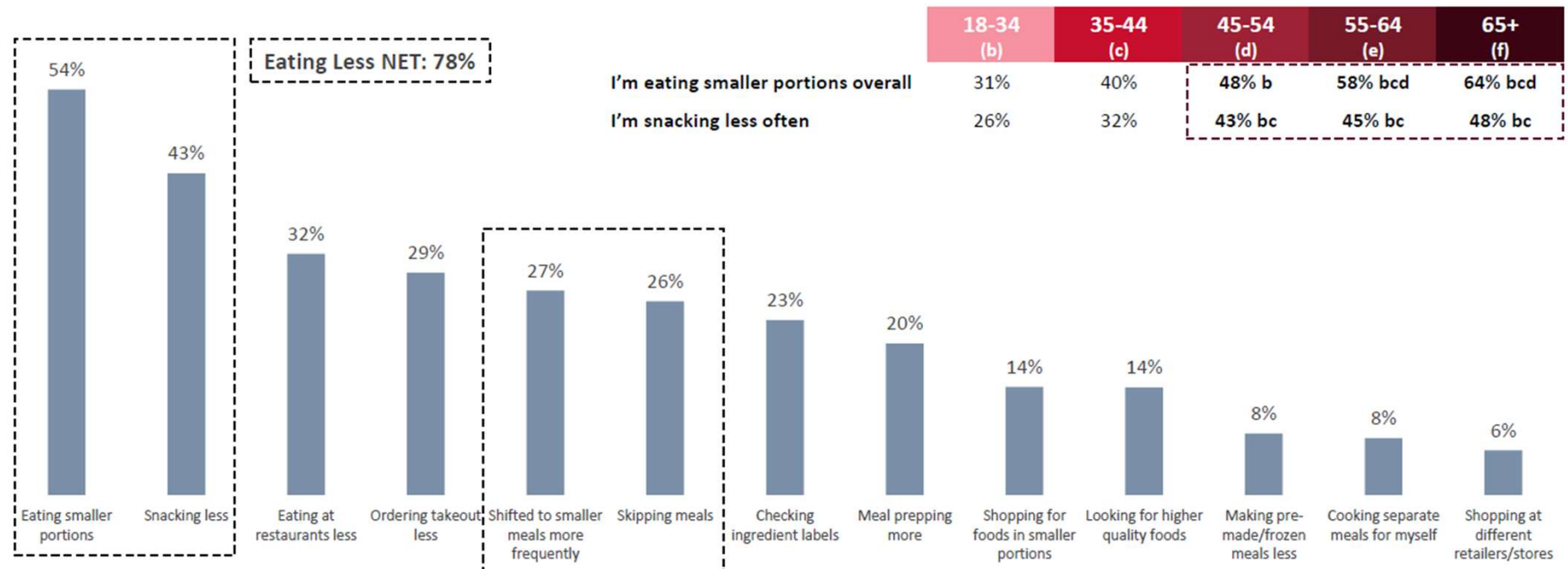
Most GLP-1 Users Eating Less

Since starting GLP-1 medications, which of the following changes have you made?

Habit Changes Since Starting GLP-1s

By Total GLP-1 Users

■ Total

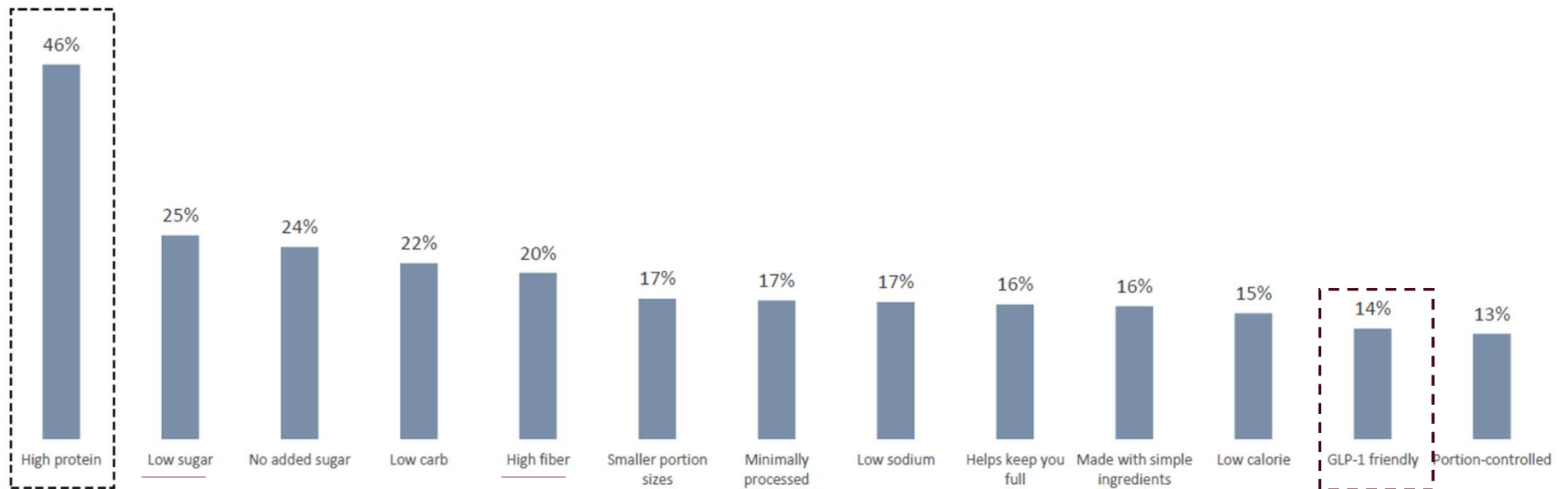


“High Protein” Is Most Important Packaging Claim

Since starting GLP-1 medications, which of the following product/packaging claims are most important to you when choosing which foods to purchase?

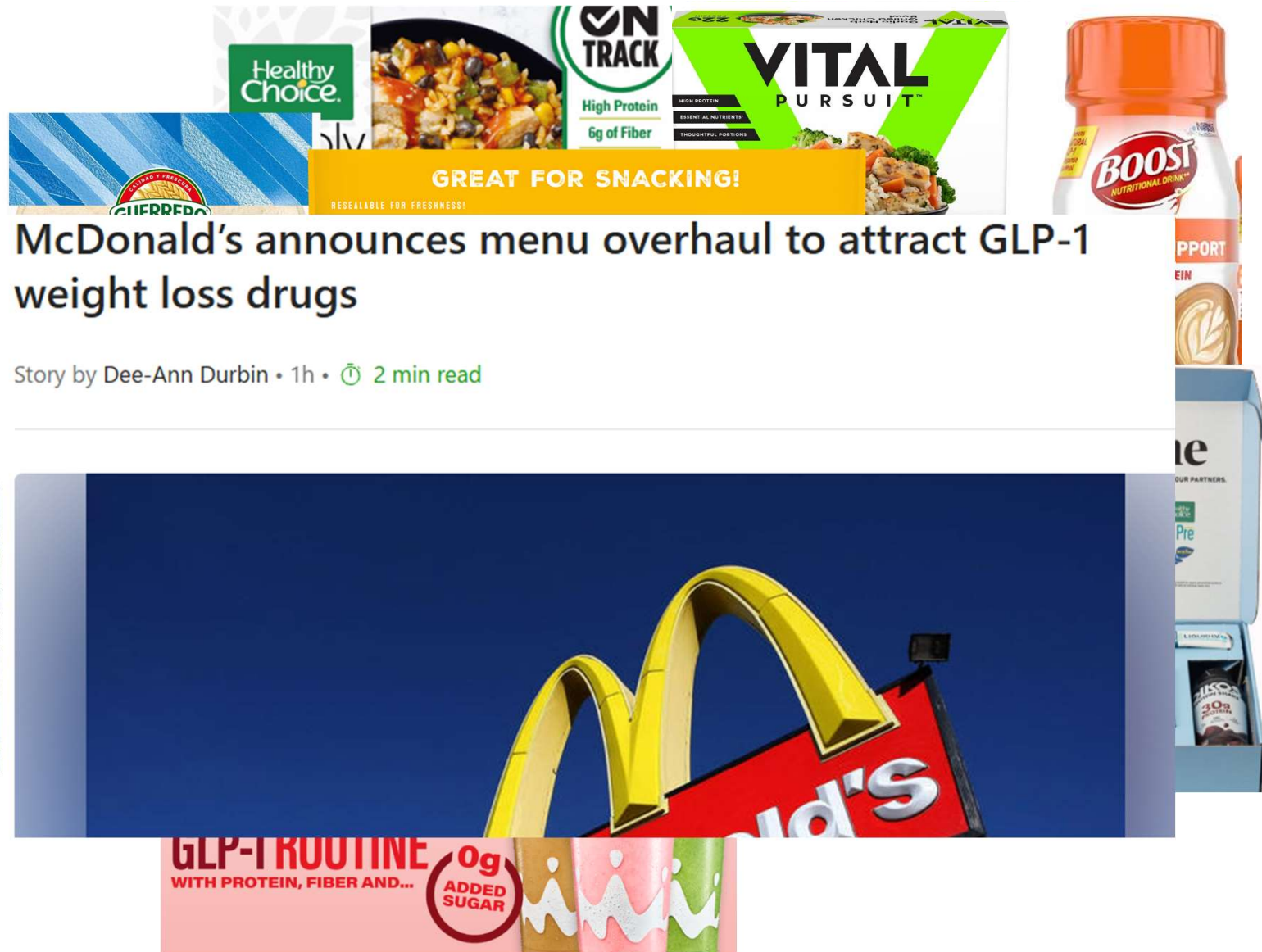
Most Important Product/Packaging Claims

By Total GLP-1 Users



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

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



**Formulate with Intention:
Opportunities to stay
ahead and avoid liability.**

Positioning Your Portfolio



Portfolio Optimization

ID SKUs that already meet GLP-1 consumer needs

- Portion size, protein, fiber, nutrient density

Update claims, packaging and messaging



Targeted Innovation

Smaller portions

- Packaging innovation

Deliver “more per bite.” - Higher-protein + Fiber-forward formulations



Smart Claim Strategy

Partner early with regulatory, nutrition, and legal teams internally

Stay ahead of regulatory risks

Focus on clearly defined claims

- Protein
- Fiber
- Sugar/Added Sugar

Protein Claims

PDCAAS converts declared grams into the protein that counts toward claim thresholds.

STATEMENT OF FACT

Declare the amount

“7g protein per serving”

GOOD SOURCE

10–19% DV

also “contains” or “provides”

EXCELLENT SOURCE

≥ 20% DV

also “high” or “rich in”

WORKED EXAMPLE PDCAAS - %DV PROTEIN

$$7\text{g declared} \times 0.57 \text{ PDCAAS} = 3.99\text{g countable}$$

PDCAAS score range: 0–1

$$3.99\text{g} \div 50 \text{ g Daily Value} = 8\% \text{ DV}$$

Protein quality—not the declared grams alone—sets the claim level.

Nutrition Facts	
6 Servings per container	
Serving size	1 tortilla (43g)
Amount per serving	
Calories	70
% Daily Value*	
Total Fat 3g	4%
Saturated Fat 1g	5%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 280mg	12%
Total Carbohydrate 16g	6%
Dietary Fiber 14g	50%
Total Sugars 0g	
Includes 0g Added Sugars	0%
Protein 7g	8%
Vitamin D 0mcg	0%
Calcium 80mg	6%
Iron 1.2mg	6%
Potassium 40mg	0%

* The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

8% DV

Below the 10% “good source” threshold

Fiber-Forward Claims

Some claims require disclosure.

STATEMENT OF FACT

Declare the amount

"X g fiber per serving"

NUTRIENT CONTENT CLAIM

10–19% / $\geq 20\%$ DV

Good or excellent source;
requires total fat disclosure
4g total fat per serving

NET CARBS

Must show math

Total carbohydrate minus dietary
fiber

WHOLE GRAINS

Quantify amount

"Contains xg whole grains",
"made with whole grains," or add
WG stamp 3rd party

NUTRIENT CONTENT CLAIM PROOF

14 g fiber $\rightarrow$ **50% DV**

Qualifies as an excellent source or high

The label does provide the total fat disclosure: 4 g (5% DV).

NET-CARB PROOF

14g total carbs – **14g** fiber = **0 g net carbs**

The arithmetic must be visible.



Nutrition Facts	
8 servings per container	
Serving Size	1 tortilla (40g)
Amount per serving	
Calories	80
% Daily Value*	
Total Fat 4g	5%
Saturated Fat 2g	10%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 260mg	11%
Total Carbohydrate 14g	5%
Dietary Fiber 14g	50%
Total Sugars 0g	
Includes 0g Added Sugars	0%
Protein 5g	
Vit. D 0mcg 0% • Calcium 69mg 6%	
Iron 0.5mg 2% • Potassium 4mg 0%	
*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories	

Sugar Claims

Each claim has slightly different definitions.

STATEMENT OF FACT

Declare the amount

e.g., “0 g sugars per serving”

SUGAR FREE

<0.5g sugars

Per RACC and serving; no sugar ingredients

NO ADDED SUGAR

No sugars added

“No added sugars” or “no sugar added”

REDUCED SUGAR

≥25% less

Compare sugars per RACC with a reference product

WHAT THE EVIDENCE MUST SHOW

AMOUNT

Nutrition Facts value



THRESHOLD + INGREDIENTS

Both conditions must be met



INGREDIENTS + DISCLAIMER

Add a disclaimer if the food is not low calorie



REFERENCE PRODUCT

Document the comparison basis



Future of GLP-1 Medications

The Future of GLP-1 Innovation

Nestlé is treating GLP-1 as an opportunity, not a threat — four signals shaping the category

Eat less, get more

Smaller portions shift the goal from calorie cutting to nutrient density — protein and fiber in every bite.

Formulating for side effects

Muscle loss, hydration, and skin, hair and nail health become the innovation targets — high-protein shakes and collagen lead.

AI speeds the pipeline

AI mines scientific literature and simulates consumer behavior to surface reformulation ideas faster than traditional R&D.

Life after the drug

Patented ingredient blends aim to manage appetite rebound after consumers stop taking GLP-1 medications.

Source: Reuters, "[Nestlé looks to develop new products to serve users of weight-loss drugs](#)," August 2026

Questions?

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