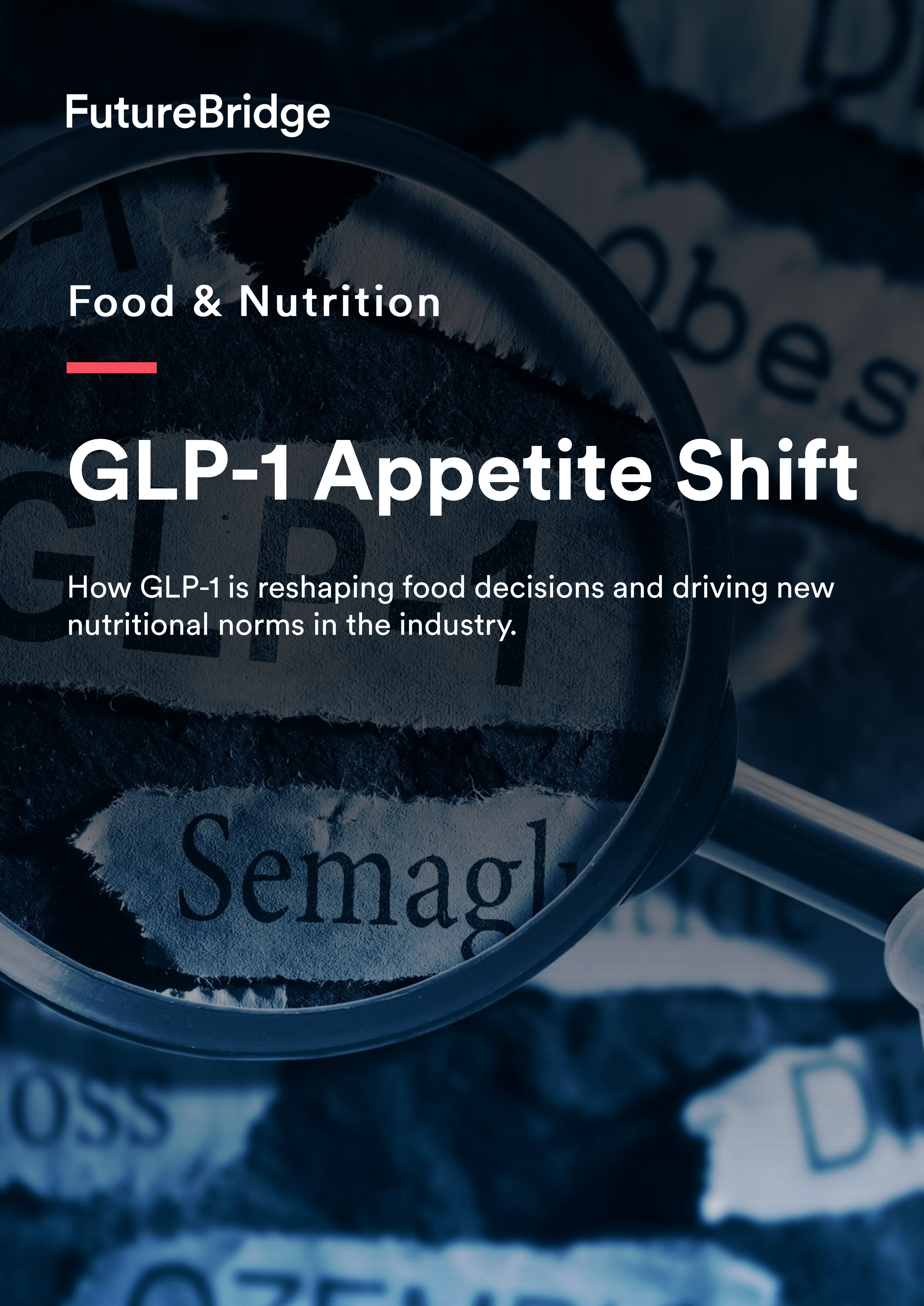
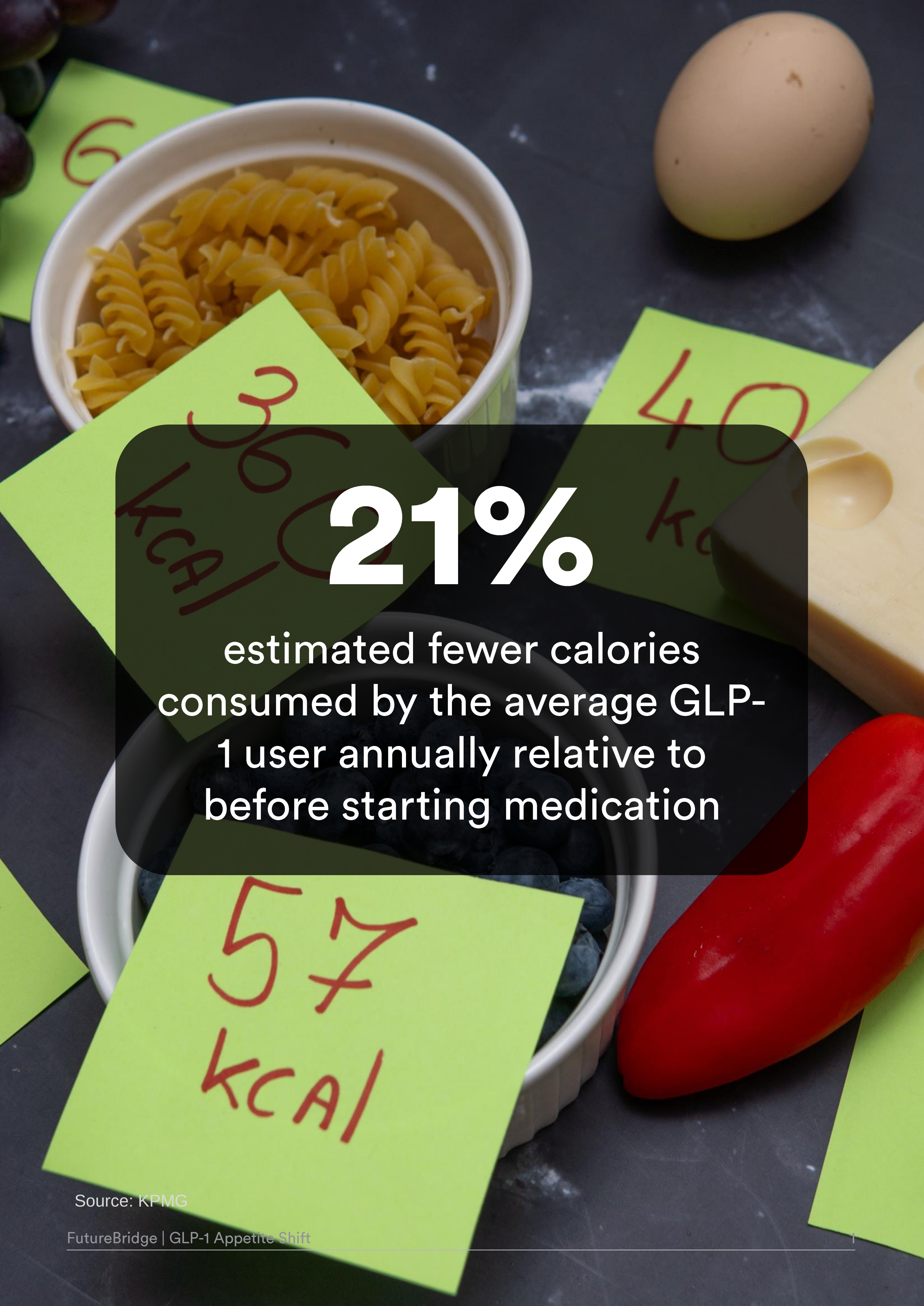
FutureBridge

Food & Nutrition

GLP-1 Appetite Shift

How GLP-1 is reshaping food decisions and driving new nutritional norms in the industry.





21%

estimated fewer calories consumed by the average GLP-1 user annually relative to before starting medication

Source: KPMG

Contents

1. Introduction: Appetite, Innovation, Impact

GLP-1 medications are transforming how consumers eat, shop, and prioritize health. Appetite suppression is just the beginning; these medications are sparking widespread ripple effects across categories, spending, and brand innovation.

The GLP-1 Appetite Revolution

GLP-1 is changing how, what, and why people eat. Appetite suppression is real. Consumer behavior is shifting fast.

66mn

expected GLP-1 users in the US by 2034

31%

of GLP-1 users spend less on groceries monthly

KEY FINDINGS:

- Portion control, protein, and fiber are top priorities
- Sugar-heavy, indulgent, and impulse categories face decline
- Three personas emerge: trend-led, goal-driven, and practical
- Functional, convenient, trusted food formats gain share
- Healthcare providers are influencing choices more than ever
- Retailers watch basket sizes shrink, and trading patterns shift

ACTION REQUIRED

1. Reformulate, resize, and reposition core products
2. Prioritize clear metabolic benefits, not just claims
3. Adapt fast to protect volume, margin, and brand relevance

GLP-1 is not a trend. It's a structural demand shift.

What if...

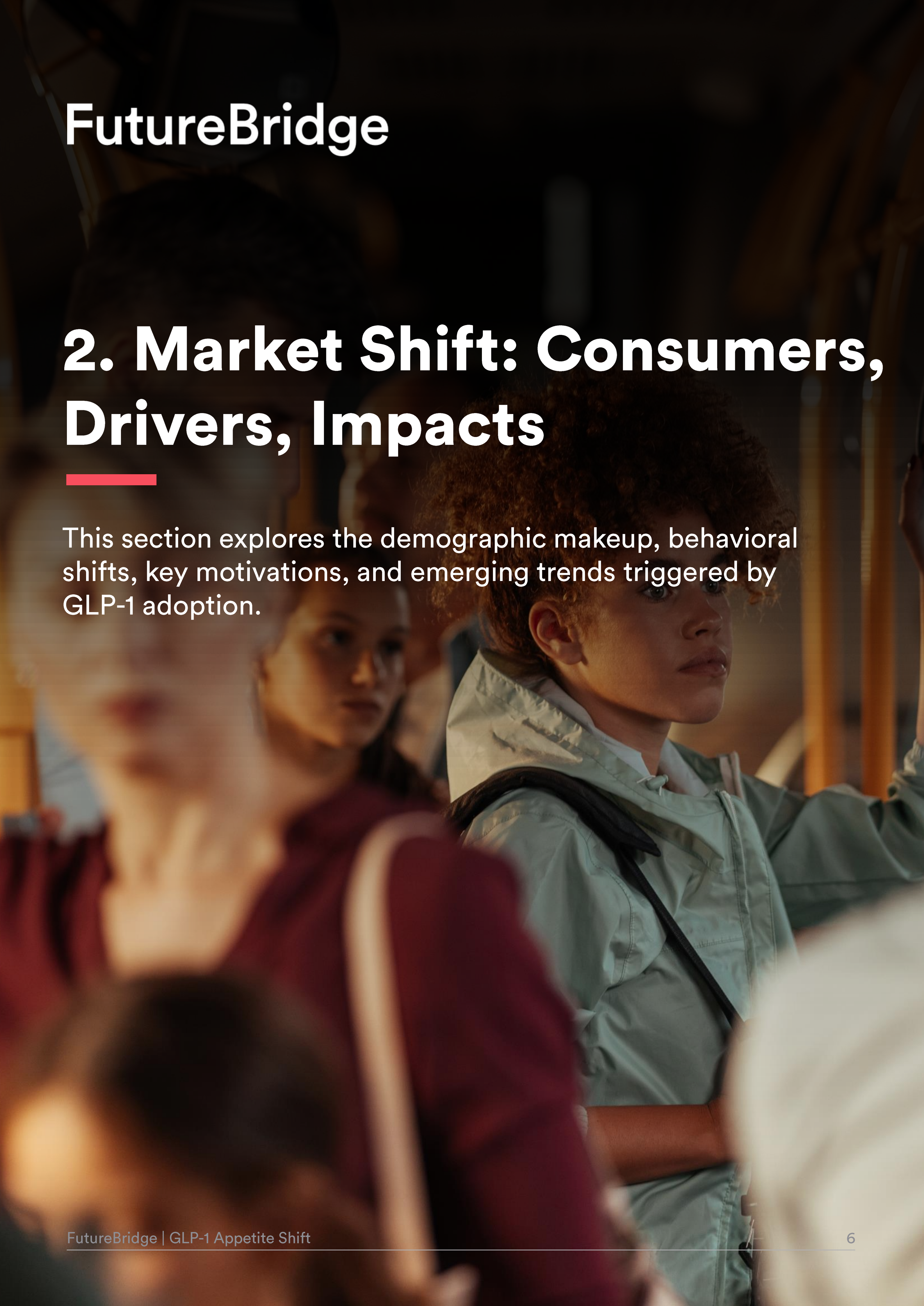
...traditional food categories vanish and are replaced by function-first formats?

...snack shelves shrink by 50%, and wellness aisles double in size?

...alcohol becomes a redundant category among health-first consumers?

GLP-1 is not just a pharmaceutical story. It is a fundamental shift in how food is valued, marketed, and consumed. Appetite control is the gateway. The deeper disruption lies in how food brands must unlearn legacy assumptions and rebuild their innovation pipelines around health-first principles.

Brands that wait for reactive cues risk being outpaced by bold players already pivoting to precision nutrition, portioned indulgence, and science-backed claims. This is not a moment for optimization. It is a reset.



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2. Market Shift: Consumers, Drivers, Impacts

This section explores the demographic makeup, behavioral shifts, key motivations, and emerging trends triggered by GLP-1 adoption.

GLP-1: A Market Transformer

GLP-1 medications are creating ripple effects across the global food system. From consumer calorie intake to overall category performance, the data points to significant disruption.

66mn

expected GLP-1 users in the US by 2034

31%

of GLP-1 users spend less on groceries monthly

2.5%

drop in national calorie intake projected by 2035

+29%

CAGR expected in global GLP-1 market through 2030

Sources: KPMG | CNBC | Healthline

Rethinking Appetite Norms

GLP-1 is shifting consumer priorities toward function over habit. Appetite suppression is now driving cleaner, smaller, and more intentional eating choices.

1

Less in More

Appetite suppression among GLP-1 users leads to lower calorie intake and smaller portion sizes, driving growth in mini meals, single-serve packs, and snackable nutrition formats.

2

Health Before Habit

Consumers are now prioritizing metabolic and nutritional health over taste-driven routines, increasing demand for clean-label, high-protein, low-sugar, and functional food solutions.

3

Indulgence to Innovation

Traditional indulgent items like confectionery, snacks, and soft drinks are being swapped out for protein-rich snacks, drinks with adaptogens, and mood-boosting or hunger-regulating ingredients

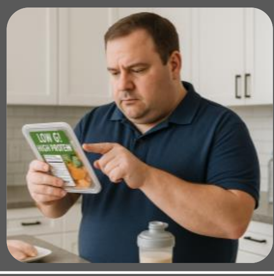
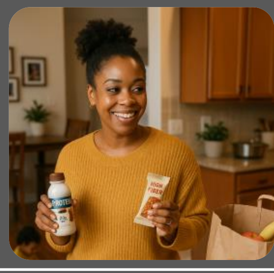
Forces shaping the shift

GLP-1 medications are accelerating change across the food sector while exposing vulnerabilities in product development and access. The following forces define where momentum will build and where friction may limit scale. Understanding this balance is key for strategic positioning.

Key Drivers	Key Restraints
Calorie Awareness Users are demanding low-calorie, high-nutrition alternatives	**Cost Barriers** Access remains limited by affordability
Lifestyle Medicine Behavior change is extending beyond prescription use	**Side Effects** Consumer hesitancy is still a risk
Product Reformulation Brands are racing to meet emerging preferences	**Slow Regulation** Claim and labeling lag hinders reformulation
Demographic Growth Affluent, younger users are driving early uptake	**Limited Global Reach** Uptake is concentrated in developed markets

GLP-1: A Market Transformer

GLP-1 users are not a monolith. Their motivations, purchasing decisions, and dietary priorities vary widely. By understanding these personas, food and nutrition companies can better match product formats, marketing language, and innovation to emerging consumer segments. These examples represent key user mindsets shaping market demand.

	THE TREND TRACKER 	THE CALORIE STRATEGIST 	THE PRACTICAL PLANNER 
Age / Socio-Economic Group	25–39 Affluent, urban, top 30% income bracket	35–55 Middle to upper-middle income	40–65 Value-conscious, modest income
Family / Living	Single or DINKs Urban renters, digitally native	Parents or couples Suburban, routine-led	Multigenerational or caregiver households Suburban/rural
Supporting Data	71% of GLP-1 weight loss users are GenX/Millennials	21% fewer calories consumed annually	49% are buying more affordable food
Habits & Motivations	Trend-led, socially influenced, explores proactively	Goal-focused, structured, tracks intake	Seeks convenience, routine, low effort integration
GLP-1 Mindset	Early adopter, self-optimiser	Analytical optimizer, driven by results	Follows HCP guidance, focuses on outcomes
What They Need	Novel, branded formats: shots, smart snacks, protein	Portion-controlled meals, functional dairy, low-GI carbs	Affordable staples with metabolic benefits: fortified frozen meals, simple labels

From Calories to Consciousness

GLP-1 users are exhibiting distinct shifts in how they consume, shop, and define food value. These changes offer both immediate category disruption and longer-term cues for innovation across health-forward platforms.

1. Reassess Impulse-Led Exposure

GLP-1 users consume fewer calories, reducing demand for non-essential items like candy, chips, and soda. Impulse-driven purchases are notably declining.

2. Prioritise Nutrient Density

Smaller appetites demand more from less. Reformulate around concentrated nutrition and functional efficiency.

3. Prepare for Alcohol Volume Reset

Alcohol consumption patterns are shifting. Scenario-plan for long-term category contraction and non-alc transitions.

4. Enable Compressed Nutrition

Fewer eating occasions require products that deliver complete macros. Focus innovation on convenient, balanced formats.

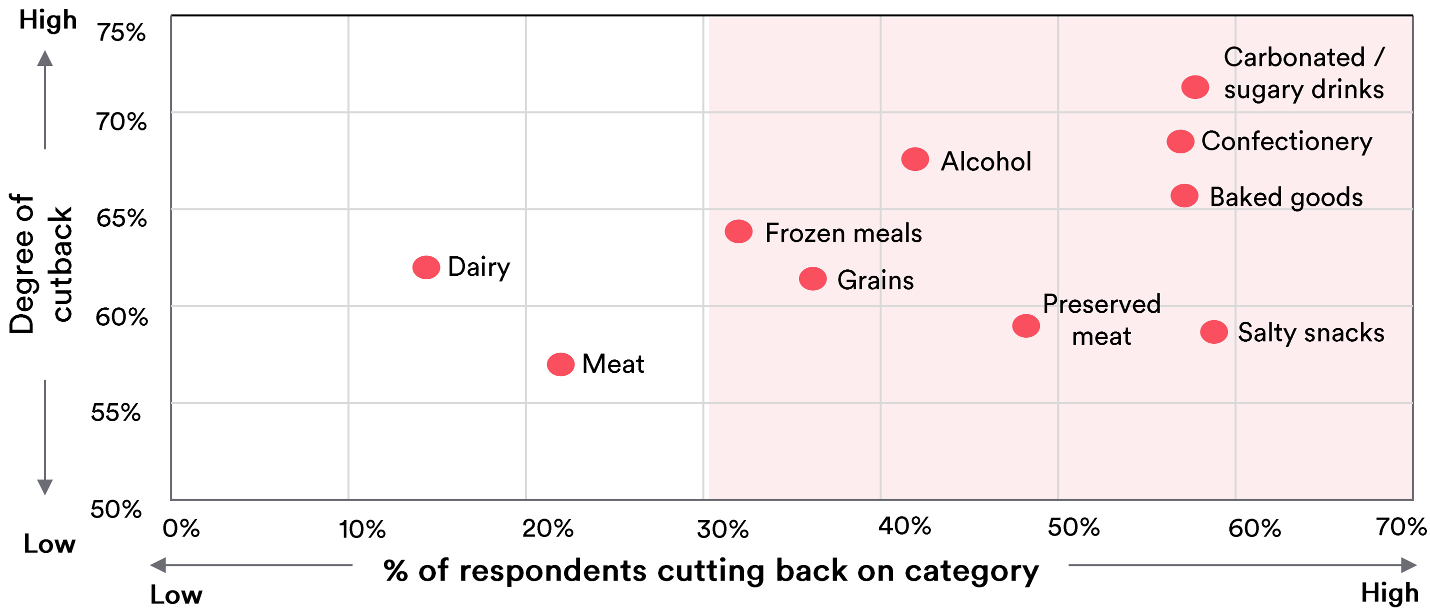
5. Expand Hydration Strategy

Hydration is becoming a functional anchor. Explore whitespace in cognitive, recovery, and performance territories.

GLP-1 Users Reduce Processed First

Individuals using GLP-1 medications for weight loss demonstrate a notably greater reduction in their consumption of snacks, sugary drinks, baked goods, and confectionery compared to non-users – putting these categories at greater risk.

GLP-1 Impact: % of respondents cutting back, by category



Note: Degree of cutback represents how much spending is being reduced by GLP-1 consumers
Source: Morgan Stanley Research; PWC;

According to a recent study, semaglutide may influence taste pathways and brain regions related to taste processing, potentially reducing the desire for sweet and energy-dense foods in individuals with obesity. The study also reported an increased preference for whole foods, including fruits, vegetables, legumes, poultry, and fish. On average, GLP-1 users spend approximately 11% less across most food categories

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3. Innovation Movers: Players, Launches, Patents

This section explores how leading brands and emerging players are reacting to GLP-1 disruptions through reformulated offerings, targeted claims, and strategic innovation pipelines.

Key Players – Established Brands

As established players adapt to the GLP-1 era, their strategies reflect the scale and urgency of change. Appetite control, portion precision, and functionality are becoming central pillars in reformulation.

Nutritional leaders adapting to the GLP-1 wave

COMPANY	FOCUS AREA	STRATEGIC ACTION
Conagra Brands	Healthy Managed Meals Range	Launch of GLP-1 friendly nutrition meals
Nutra Balance	Therapeutic meal kits	Functional Kits for GLP-1 users
Nestlé	Health science, protein products	Protein drink messaging, mini-meals and meal kits
Abbott	Medical nutrition & diagnostics	Convenient weight management solutions
Herbalife	Weight management, protein drinks	Expanded portion-size offerings
ADM	Functional ingredient innovation	Started a platform service for ingredients

Conagra: Simple ‘GLP-1 Friendly’ Messages

Positioned for GLP-1 users through clear, front-of-pack nutritional signals, high protein, fiber, and GLP-1 friendly messaging.

Conagra Brands

CONAGRA BRANDS

HQ: USA

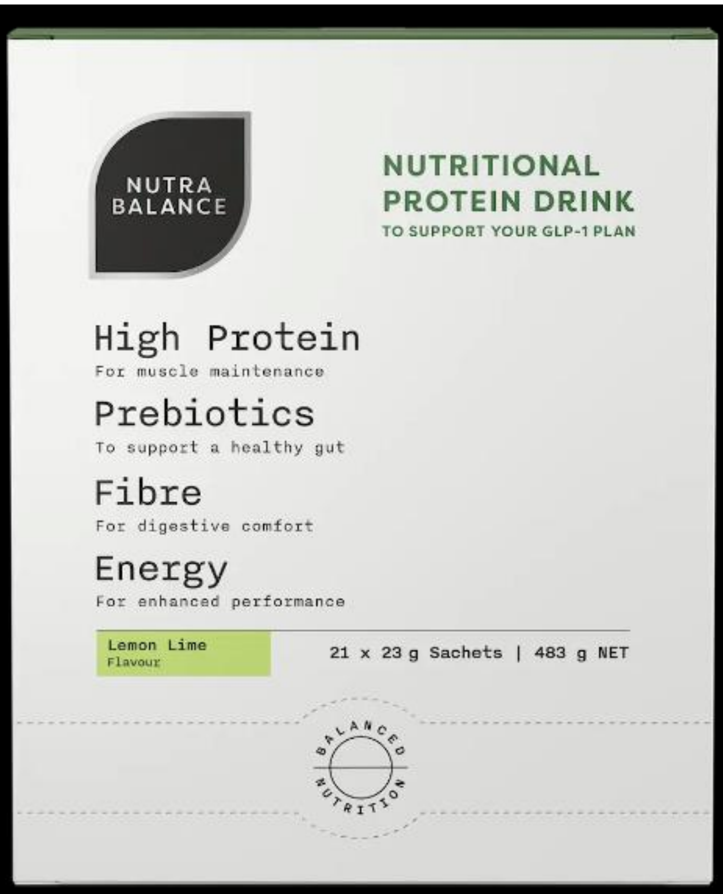
Launch Date: 2024

Health Claim: Supports GLP-1-friendly diets

Key Ingredients: Chicken breast, edamame, broccoli, carrots, red peppers

Product Type: Frozen Ready Meals

Nutrabalance: Reformulating Functional Kits for GLP-1 Users



A smart nutrition kit that balances protein, omega-3s, and adaptogens to support reduced appetite and energy needs.

Nutrabalance

HQ: Australia

Launch Date: 2024

Health Claim: Balanced Nutrition for appetite support

Key Ingredients: Protein isolate, adaptogens, omega-3

Product Type: Single-serve nutritional kits

NestléHealth Science Expands to Metabolic Nutrition

Designed meals and drinks that cater to GLP-1 users' appetite control while delivering metabolic support.

Nestlé

HQ: Switzerland

Launch Date: 2023-24

Health Claim: Supports controlled hunger and energy

Key Ingredients: Whey protein, fiber, magnesium

Product Type: Meal portions and drinks

Abbott: From Diagnostics to Portion Control Nutrition

A clinical-grade drink providing essential nutrition in compact servings for those with reduced food intake.

Abbott

Abbott

HQ: United States

Launch Date: 2023

Health Claim: Complete nutrition for reduced intake

Key Ingredients: Protein blend, vitamins, fiber

Product Type: Ready-to-drink clinical nutrition

Herbalife: Lifestyle Health Meets Portion Innovation

Protein-focused shakes tailored to deliver satiety with every scoop for health-conscious consumers managing reduced intake.

Herbalife Nutrition

Herbalife

HQ: United States

Launch Date: 2024

Health Claim: Supports satiety and controlled calories

Key Ingredients: Plant protein, multivitamin complex

Product Type: Powder shakes with portion control

ADM: Functional Ingredient Platform Targeting GLP-1 Effects

A versatile ingredient system aimed at helping brands reformulate for satiety, metabolic support, and functionality.

ADM

HQ: United States

Launch Date: 2025

Health Claim: Enhances satiety and metabolic health

Key Ingredients: Soluble fiber, chromium, adaptogens

Product Type: Ingredient platform for co-branding

Emerging Innovators

Newer players are entering with personalized, science-driven propositions built to meet the emerging nutritional needs of GLP-1 users. These startups emphasize personalization, convenience, and functional efficiency.

Quanti Health™

HQ: China

Patent No: CN118421537A

Key Technology: Functional strain + powder formulation of microbial inoculum

Health Claim: Inhibits weight gain, lowers glucose, and increases GLP-1 via GPR120 activation

Application: Probiotic-based functional food

Beauty Health Nutrition

HQ: Japan

Patent No: JP2024120867A

Key Technology: Manuka leaf and bark extract processed via solvent extraction and drying

Health Claim: Supports GLP-1 release while regulating postprandial glucose and improving metabolic profiles

Application: Botanical-based functional food

Green Gourmet

HQ: Denmark

Patent No: WO2024/141619 A1

Key Technology: Pulsed energy drying of Brassica plant matter under 60°C

Health Claim: Supports GLP-1 release while regulating postprandial glucose and improving metabolic profiles

Application: Plant-based functional ingredient (powder, bar, gel)

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4. What's Your Next Move in the GLP-1 Era?

GLP-1 is reshaping what, when, and why consumers eat. Now is the time for food companies to act with precision. Realign innovation, positioning, and portfolios to meet this profound behavioral shift.

GLP-1 - Changing Food & Beverage Consumption Scenario

GLP-1 is driving permanent behaviour change. The **Trend Tracker** wants innovation and control. The **Calorie Strategist** seeks precision and planning. The **Practical Planner** prioritises simplicity and value. Appetite is down. Expectations are up. Action is essential. FutureBridge recommends four clear actions to convert disruption into competitive advantage:

Appetite Reframe

GLP-1 users feel less hunger but want purposeful nourishment when they do eat.

We help identify white spaces for nutrient-dense, smaller-portion formats aligned to new eating cadences.

Protein Precision

Satiety and muscle preservation are placing protein-rich innovation at the center.

Our innovation radar tracks protein trends across regions, sources, and claim spaces to guide R&D.

Sugar Sensitivity

Tolerance for sweetness is declining, forcing a rethink of indulgence and formulation.

We map the sugar-reduction and sweetener innovation landscape to inform reformulation strategies.

Brand Repositioning

Brands must signal control, health, and simplicity while maintaining appeal.

We co-create new brand narratives and sensory identities that align with evolving wellness expectations.

GLP-1 is not a trend. It is a behavioral reset. The winners will be those who innovate with empathy and precision.

An appetite reset by 2030

Appetite suppression is not a trend. It is a reset. The global GLP-1 market is forecast to reach $100 billion by 2030*, reshaping how food is formulated, marketed, and consumed. This reset can be structured into four zones of 'appetite':

1. Prevent – Proactive formulations that support metabolic health before pharmaceutical intervention is needed.
2. Portion – Structurally designed formats that align with reduced appetite and promote calorie control.
3. Replace – Smart reformulations that deliver indulgence with lower sugar, fewer calories, and better glycemic profiles.
4. Fortify – Nutrient-enhanced products that replenish what suppressed appetite may reduce, from protein to micronutrients.

Next Steps:

- **Reformulate Portfolio** – Audit current products for portion fit, protein density, and sugar levels.
- **Scout Partnerships** – Track and partner with emerging functional brands and platforms.
- **Claims Strategy** – Align messaging with satiety, metabolic health, and mindful eating.

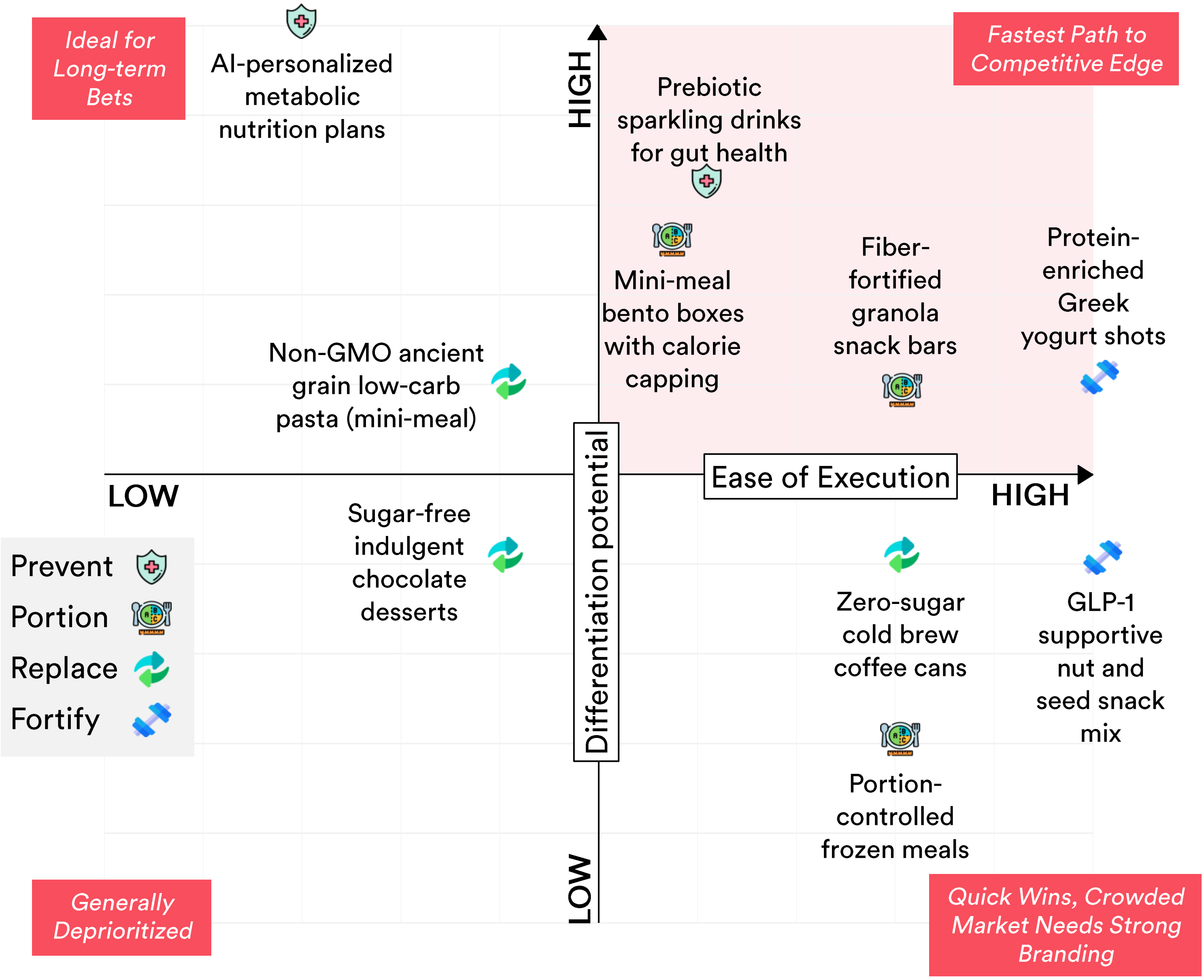
Between 2025 and 2030, we anticipate an accelerated shift from Prevent (healthier reformulation) to Portion (calorie and volume reduction) to Replace (total category substitution or bypass).

*Source: Goldman Sachs Research

The four zones of appetite...

Quick-win formats in Portion and Fortify zones offer scalable entry points, while Prevent and Replace unlock longer-term brand leadership. Leaders should activate near-term opportunities while incubating high-barrier, high-reward innovations in parallel.

FutureBridge GLP-1 Innovation Opportunity Quadrant



***Differentiation Potential** – Innovation Distinctiveness measured by: novelty of format or ingredient, IP or white space presence, competitive saturation, consumer uniqueness perception.*
***Ease of Execution** – Cost, speed, and complexity of new innovations measured by: formulation complexity, manufacturing adaptability, ingredient accessibility, regulatory barriers, time-to-market.*

How FutureBridge Supports Your GLP-1 Strategy

FutureBridge enables food leaders to develop strategies to meet the four zones of appetite and act on the disruption created by GLP-1 across the value-chain.

Value Chain	Growth Play 2025-30	Capability Need
Upstream agri-inputs	Higher demand for specialty pulses, mycoprotein, precision-fermented dairy proteins; lower demand for HFCS & certain oils.	Contract farming, alternative-protein tech partnerships
Processing & manufacturing	Flexible small-batch lines, high-moisture extrusion, aseptic protein RTD fillers.	CapEx in multi-protein lines; rapid SKU change-over
Packaging	Shift from family to single-serve even as unit volumes rise but tonnage falls; F-pack label space needed for protein call-outs.	Lightweight rigid cups, recyclable mono-material flexibles
Distribution & retail	Store-within-store "GLP-1 wellness" bays, tele-nutrition bundle (drug + companion foods).	Joint ventures with pharmacy chains, AI-driven Planogram refresh
Brand & marketing	Science-backed nutrition authority, influencer-RDs, avoid explicit drug claims.	Evidence dossiers, healthcare-provider outreach, precision media

Meet the experts

Rima Mittra

Associate Director: Food & Nutrition

Rima Mittra is a seasoned techno-commercial leader with over 15 years of experience in the food and nutrition industry. She specializes in translating emerging innovations and market trends into strategic, actionable insights. Renowned for her expertise in portfolio strategy planning, Rima combines deep technical knowledge with sharp commercial acumen to guide forward-looking decisions that shape competitive advantage.

Edward Bergen

Principal: Insights & Strategic Marketing

Edward Bergen is a Principal Analyst at FutureBridge, driving strategic insight across the food & nutrition and chemicals & materials practices. With over a decade of experience in the food industry, he delivers forward-looking perspectives on the future of food. Edward is known for his engaging speaking style and passion for storytelling.

Plan Your GLP-1 Response

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