THE FUTURE OF GLP-1

A Horizon 10 Perspective

CARBERY

HOR1ZON

Contents

01

Introduction

GLP-1 agonist medications are revolutionising obesity management and reshaping the food market. These drugs (e.g. semaglutide/Ozempic® and tirzepatide/Mounjaro®) deliver unprecedented weight loss, often 10 –15% of body weight, far beyond typical diet results.

Since approval for chronic weight management in 2021, they have seen extraordinary uptake. By 2025, roughly 1 in 8 U.S. adults has used a GLP-1 weight-loss prescription.

Global demand is surging, with analysts projecting the GLP-1 market to reach ~$160 billion by 2030. This rapid adoption is driven by their effectiveness: GLP-1 medications suppress appetite by slowing digestion and enhancing fullness signals, so patients naturally eat much less. As a result, people on GLP-1 therapy typically consume 20–30% fewer calories, leading to fat loss while also risking some lean muscle loss.

The implications for the food and beverage industry are profound. Early data show GLP-1 users consistently buying and eating less food. For example, one consumer survey found GLP-1 households cut their grocery spending by ~6% within six months of treatment. Another reported that 59% of U.S. patients increased their fruit and vegetable intake, while 33% cut back on cakes and pastries after starting GLP-1 therapy.

Categories full of "empty calories" sugary drinks, sweets, baked goods are seeing noticeable declines. The JAMA Cardiology journal estimates 137 million Americans could be eligible for semaglutide, suggesting a potential "value at risk" of $150 billion in annual food spending if traditional eating habits shift accordingly.

In response, companies have begun reformulating products to be smaller, higher in protein/fibre, and less sugar-laden, aiming to meet the needs of consumers who "eat less but need more from every bite". Indeed, global new product launches carrying a weight-management claim jumped +10% year-on-year recently– a sign that industry is pivoting to healthier, satiety-oriented offerings.

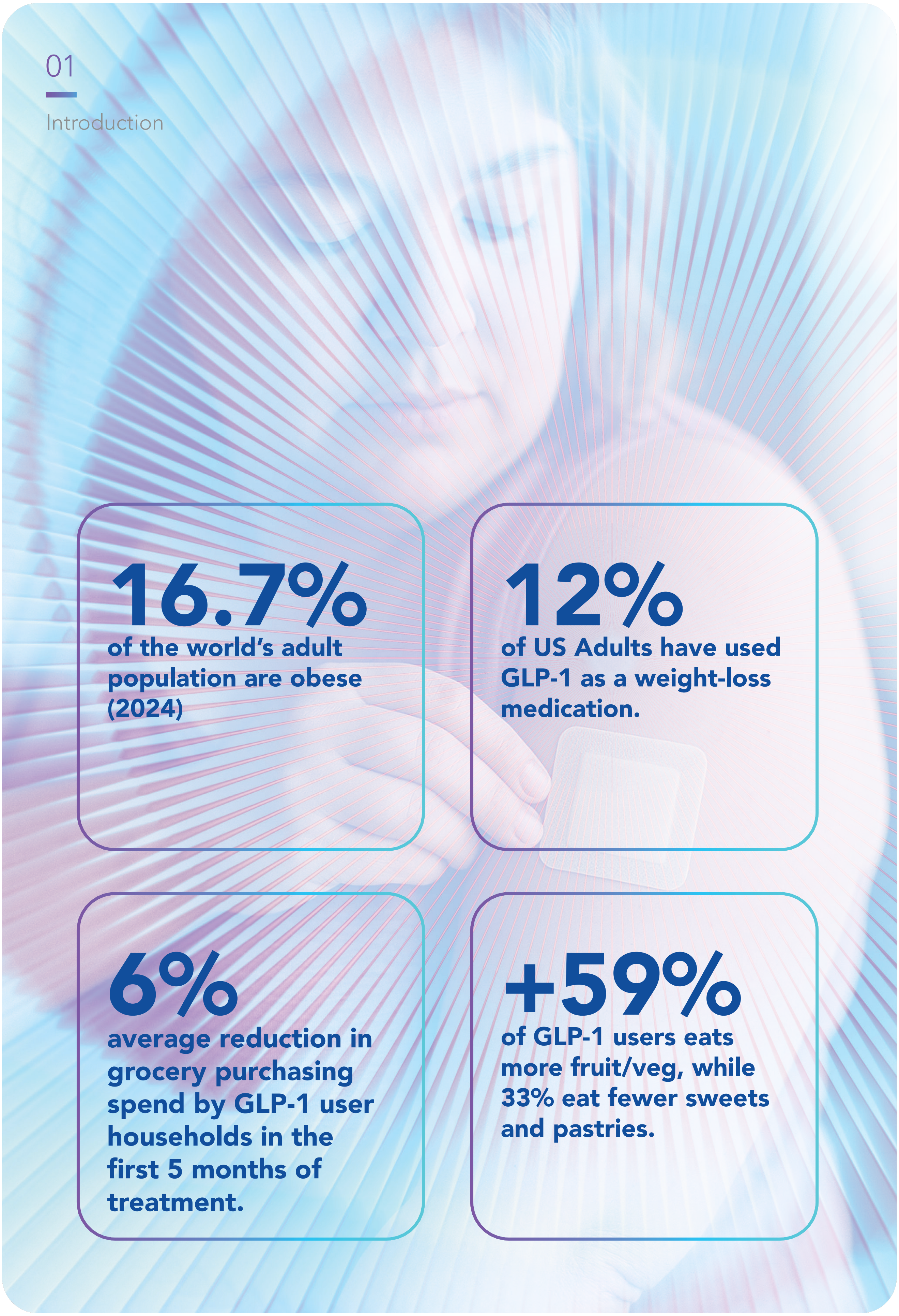
"GLP-1 analogues treat obesity and even reduce related complications. Now we're seeing hints of benefits beyond weight, for example, reduced alcohol cravings, with promising results."

Prof. Carel le Roux, UCD School of Medicine

In short, GLP-1 medications have introduced a new paradigm: medical appetite control at scale. Over the next decade their influence on consumer behaviour is set to grow, compelling food businesses to innovate rapidly.

01

Introduction



16.7%

of the world's adult population are obese (2024)

12%

of US Adults have used GLP-1 as a weight-loss medication.

6%

average reduction in grocery purchasing spend by GLP-1 user households in the first 5 months of treatment.

+59%

of GLP-1 users eats more fruit/veg, while 33% eat fewer sweets and pastries.

02

FOOD & BEVERAGE LANDSCAPE

GLP-1s are one driver towards "Peak Calorie" in developed markets

Perhaps the single largest challenge confronting the food and beverages industry in developed markets in the coming years is the coming of "Peak Calorie" or the moment at which total calorie consumption moves into long-term decline.

The industry will therefore have to assume that volume growth at a topline level is no longer possible the way it once was for any mature food or beverage category. This will force companies into adopting one of several strategies. The preference will likely be a "less but better" approach that focuses on value growth, though this will not be suited for all categories. Alcohol has embraced this strategy for years, with mixed results. Other categories of food and beverages are likely to try something similar in the future.

Most categories are going to see volume hits

Early research on GLP-1 users has indicated a picture that is unquestionably negative for food and beverage spending. A study conducted by several researchers at Cornell on the shopping habits of households with a GLP-1 user, for example, found just four categories saw increased sales - nutrition bars, fresh produce, meat snacks and yoghurt. Every other tracked category fell, with potato crisps/chips and sweet bakery items fairing the worst.

Fresh foods alone have reason to be somewhat optimistic about rising GLP-1 usage because of a clear preference among users towards fresh produce and lean, unprocessed meats. Hot drinks will probably be the least affected category overall, though some evidence does report declining interest in coffee consumption (the digestive concerns of users will be a boost for tea however). The rest of the categories should see internal shifting towards more nutrient-dense, clean label subcategories and away from more highly-processed and sweetened ones. Soft drinks, for example, should see big losses from carbonates and juices, only partially mitigated by gains in waters and functional concentrates. Overall however, declining volumes are going to accompany rising GLP-1 usage and no amount of reformulation will entirely avoid that.

Effect of GLP-1 usage by category

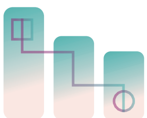
Category	Net effect	Comments
Alcoholic drinks	↓	Many users report declining interest in alcohol. All subcategories likely affected roughly equally.
Hot drinks	↔	Some declines in coffee consumption but potential gains in areas such as herbal teas; high-sugar products at most risk.
Soft drinks	↓	Bottled water and some concentrates could pick up but most categories, especially carbonates, will struggle.
Snacks	↓	The most at-risk category in the short term. Most categories strongly down, particularly confectionery products, sweet biscuits and savoury snacks such as potato chips. Long-term desire for smaller portions however could turn things around.
Fresh foods	↑	Rising interest in fresh produce, lean proteins and natural sources of fibre. Key will be moving users from processed categories.
Dairy	↓	Yoghurt likely to rise, others such as butter and cheese to decline.
Staple foods	↓	Losses in baked goods and more heavily processed subcategories, likely gains in less-processed produce, meats, and whole grain carbohydrates.
Cooking ingredients and meals	↓	Reformulations of ready meals could keep category stable; gains in areas such as packaged salads, losses in many condiments and sauces.

02

Food &
Beverage
Landscape

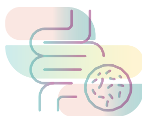
GLP-1s are an accelerant to trends that are already underway

GLP-1 sceptics will try to dismiss their importance, arguing that their impact is hidden within wider consumer trends, such as sluggish overall volume growth, rising demand for "nutrient-dense" foods, greater interest in digestive health, declining alcohol consumption, and high-protein preferences. Yet while these trends would exist without GLP-1 drugs, their adoption will intensify them. As a result, the nutritional goals of many non-users will resemble those of users, meaning that products designed for GLP-1 users will attract significant interest from non-users, and vice versa.



Volume Declines

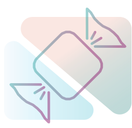
Rising Protein Demand



Interest in Gut Health

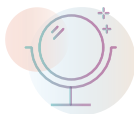
Hydration Concerns

Mindful Alcohol Consumption



Avoidance of Ultra-processed Foods

Portion Control



Skin Health

03

GLOBAL CONSUMER BEHAVIOUR & BELIEFS

03

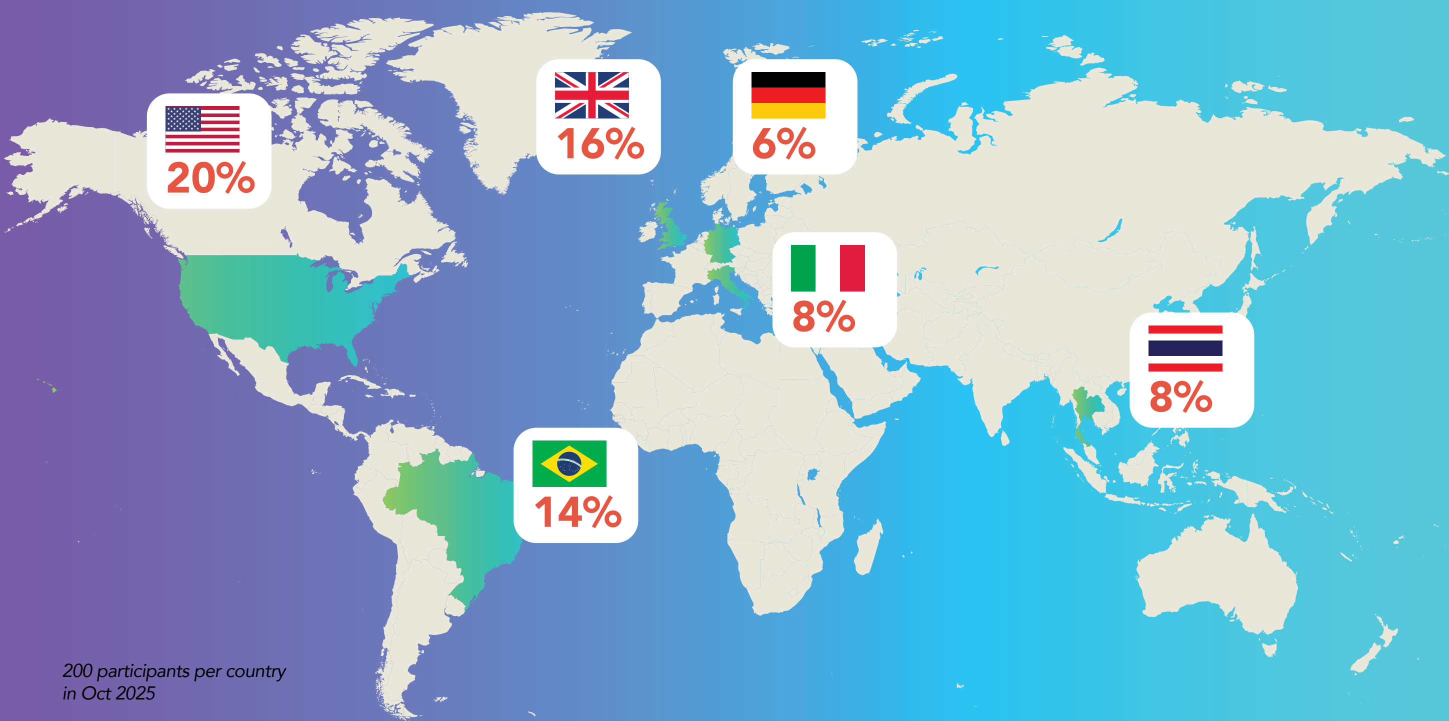
Global
Consumer
Behaviours
& Beliefs

Beyond the Hype: The Behaviour Shifts Behind GLP-1

GLP-1 drugs are reshaping food preferences and redefining how people manage their health. What started as a weight-loss trend has rapidly evolved into a mainstream behavioural shift. Yet amid the noise and excitement, the finer nuances risk being overlooked.

In 2025, we spoke to consumers across six key countries to build a clearer picture of a landscape that is far more complex than the headline narrative suggests. Across markets, consumers are eating less, prioritising protein and nutrient density, turning to targeted supplements, and showing growing interest in muscle support, gut health, and easier-to-digest formats. But how this plays out varies by country, each market has its own needs, motivations, and direction of travel.

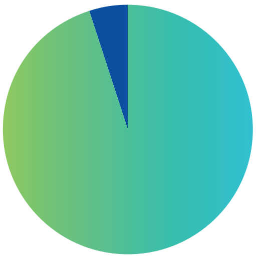
GLP-1 usage rate by country, based on survey pre-qualification



200 participants per country in Oct 2025

THE SUPPLEMENT CHALLENGE

Vitamins, followed by protein, fiber & minerals are the hardest nutrients for consumers to obtain from their diet. This is reflected in consumer purchases, with only 5% of respondents NOT supplementing their treatment. Over 80% of respondents are taking vitamin & mineral supplements, whilst 56% take electrolytes and 55% protein.



95%

of respondents felt the need to supplement their diets when using GLP-1

Top 3 supplements respondents were interested in buying that are not currently available.

31% Amino Acids

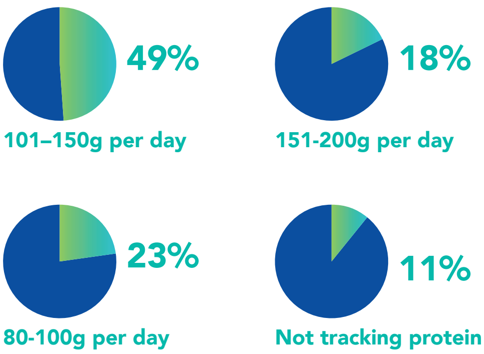
25% Prebiotics

20% Protein Fortified Drinks

PROTEIN INTAKE
A Central Focus for GLP-1 Users

GLP-1 users consistently identify protein as one of the hardest nutrients to obtain from their diet, second only to vitamins. Survey data shows that 55% of respondents supplement with protein, and over half (55%) report difficulty meeting their protein needs through diet alone.

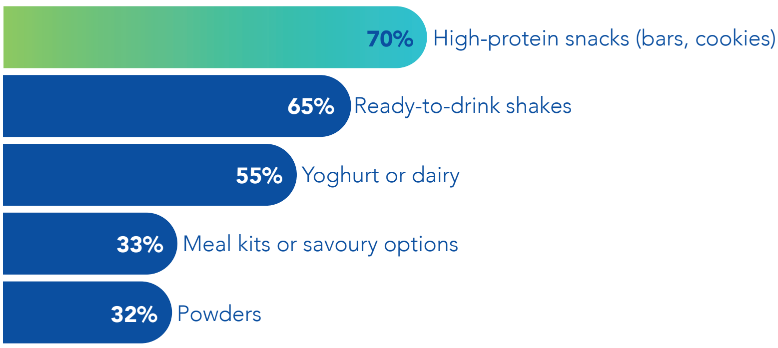
How Much Protein Are Users Targeting?



This highlights a strong trend toward higher daily protein goals, with nearly two-thirds of users aiming for at least 100g per day.

Preferred Protein Formats

Consumers on GLP-1 therapy show clear preferences for convenient, palatable, and varied protein sources:



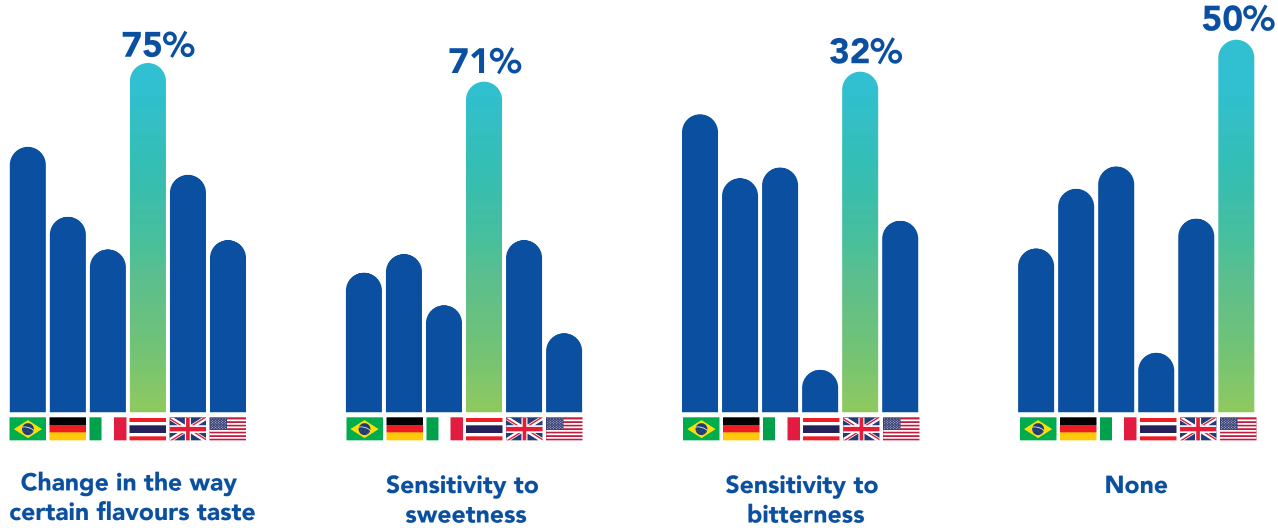
Notably, lighter protein drinks (such as clear shakes) are preferred by 70% of users over heavier, creamy shakes (30%), reflecting a desire for easy-to-consume, less filling options.

03

Global
Consumer
Behaviours
& Beliefs

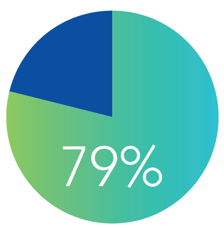
CHANGING TASTES

72% of GLP-1 users register some form of change in their perception of taste when using GLP-1 medicines. Thai consumers recorded the highest sensitivity to a change in flavour perception & sensitivity to sweetness. US consumers reported the least changes with 50% identifying no changes.



FOOD CHOICES

Health & Nutrition Profile (65%) is the top sought after attribute for GLP-1 users when it comes to chosing food. Taste/Flavour is a close second at 54%. Given that Indulgence/Pleasure scores bottom (18%) its likely that Taste/Flavour is more aligned to palatability, which aligns with 79% of consumers saying they strongly prefer functional products over indulgent ones.



Strongly Prefer Functional Products over Indulgent Products

The most important factor when choosing food and beverages by country.

Health & Nutritional Profile

Taste / Flavour

The least important factor when choosing food and beverages by country.

Indulgence / Pleasure

Brand familiarity

Texture and Mouthfeel

Get in touch for more detailed country-level data, segmentation, and actionable recommendations to help you stay ahead in this rapidly evolving market.

04

EXPANDED CONSUMER OPPORTUNITIES

GLP-1-friendly innovation will need to speak to non-users as well

The attributes GLP-1 users are looking for (higher protein, lower calories, digestive health benefits, hydration boosts, etc.,) are all of interest to consumers who have no intention of ever using these drugs. This is one of several things that makes innovation in this space complex. The other is that there are really several groups to consider here who are GLP-1 influenced in some way while not actually taking the drugs.

One major group to think about is former or inconsistent users. A study from Prime/MRx found that as many as 85% of GLP-1 users are not taking them consistently two years after starting, so this is potentially an extremely large group. Some of this is due to cost concerns but in other cases many feel they have lost enough weight and they then try to keep it off themselves, which means that at least some eating habits remain altered long term. An aspect of seasonality has also been seen, with people trying to lose weight for specific occasions rather than keep it off permanently. There is also a rising interest in other ways to generate similar effects, namely compound drugs, supplements, or foods and beverages. The effectiveness of these strategies varies but most people using these methods will modify their diets in at least some way. Then there will be a large group of people not on GLP-1s and with no interest in being on them who still might be open to GLP-1-optimised innovation. Plenty of general consumers are looking for low-calorie, nutrient-dense, high-protein foods and will recognise that products developed for GLP-1 users are likely to give them those things. There are even those simply living in households with a GLP-1 user who does the grocery shopping whose diets are changed because of their differing shopping habits. Basically, looking only at people actively using these drugs is minimising their overall effect on the consumption landscape.

04

Expanded Consumer Opportunities

THE FORMER OR INCONSISTENT USER

Profile: Individuals who have used GLP-1 medications but no longer take them consistently due to cost, side effects, or having reached their weight goals.

Behavioural Traits:

Retain modified eating habits (smaller portions, higher protein).

May seek to maintain weight loss through diet and lifestyle.

Interested in products that support satiety and muscle preservation.

Opportunity: Design foods that help sustain weight loss e.g. high-protein snacks, fortified cereals, and portion-controlled indulgences.

THE SEASONAL SLIMMER

Profile: Consumers who use GLP-1s or similar strategies intermittently, often around events like holidays, weddings, or summer.

Behavioural Traits:

Short-term focus on weight loss.

Responsive to trends and quick-fix solutions.

May combine medication with diet plans or supplements.

Opportunity: Offer flexible, goal-oriented products e.g. "reset" meal kits, protein shakes for appetite control, or snack packs tailored to short-term regimens.

THE GLP-1 HOUSEHOLD SHOPPER

Profile: Non-users who live with someone on GLP-1 therapy and whose shopping habits are influenced by that person's dietary needs.

Behavioural Traits:

Passive adopters of GLP-1-friendly products.

May not seek out these items but consume them regularly.

Open to nutrient-dense, portion-conscious formats.

Opportunity: Create family-friendly formats of GLP-1-optimised products—e.g. mini muffins, low-sugar spreads, or shared meals with balanced nutrition.

THE WELLNESS SEEKER

Profile: Health-conscious consumers who are not on GLP-1s but are drawn to the same attributes—high protein, low sugar, digestive support.

Behavioural Traits:

Actively seek functional foods.

Motivated by fitness, longevity, or clean eating.

Likely to adopt GLP-1-inspired innovations without the medication

Opportunity: Position GLP-1-friendly products as part of a broader wellness lifestyle—e.g. "metabolism-friendly" labels, gut-health snacks, or hydration boosters.

04

Expanded Consumer Opportunities

THE ALTERNATIVE EXPLORER

Profile: Individuals experimenting with supplements, compound drugs, or functional foods to mimic GLP-1 effects without prescriptions.

Behavioural Traits:

- Curious and experimental.
- May follow influencers or niche health trends.
- Interested in appetite control, energy balance, and metabolic support.

Opportunity: Develop products that offer similar benefits—e.g. satiety-enhancing ingredients, slow-digesting carbs, or prebiotic blends.

04

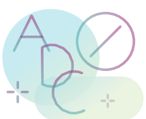
Expanded Consumer Opportunities

Influencing Factors

Side effects: important to bear in mind but will not stop the growth in usage

GLP-1 detractors often express the firm conviction that it will soon be discovered that these drugs have some sort of horrible side effect that will stop their growth in their tracks. Sometimes this is a reference to the last "miracle" weight loss drug, fen-phen, which was pulled from the market in the 1990s after it was discovered that it caused serious heart damage. More often though it is simply from a general skepticism that drugs can or should be used to solve a problem such as obesity (a strong undertone of moral judgment on those who "take the easy way out" is generally present in these criticisms).

The fact these drugs have been used long term for diabetes very strongly suggests that there is no dangerous side effect waiting to be discovered (some that are already known, and rare, are pancreatitis and gallstones). Anti-obesity usage also already dwarfs that of fen-phen. There are however, plenty of less serious side effects to consider. Digestive troubles are the most important, including nausea, diarrhoea and constipation, sometimes bad enough that people stop taking them. Other more unusual ones have been reported that include bad breath and the sagging skin and hollowed-out appearance that is sometimes called "Ozempic face" (or "Ozempic butt"). Side effects will be important to think about when considering the eating and drinking needs of the GLP-1 user but there is no reason to believe that they will significantly slow the adoption of these drugs.



Micronutrient Focus

Micronutrient intake will get more spotlight; already experts worry that people eating so little might become deficient in vitamins or lose bone density. This opens markets for fortified foods (e.g. calcium and vitamin D enriched mini-muffins to support bone health) and for monitoring solutions (smart kitchen devices that track nutrient intake). Food brands that traditionally didn't play in health may pivot here, for instance, a soda company launching a vitamin-infused hydration drink for people on weight-loss journeys.

04

Expanded
Consumer
Opportunities

A wave of patent expirations in 2026 will massively expand global usage

US

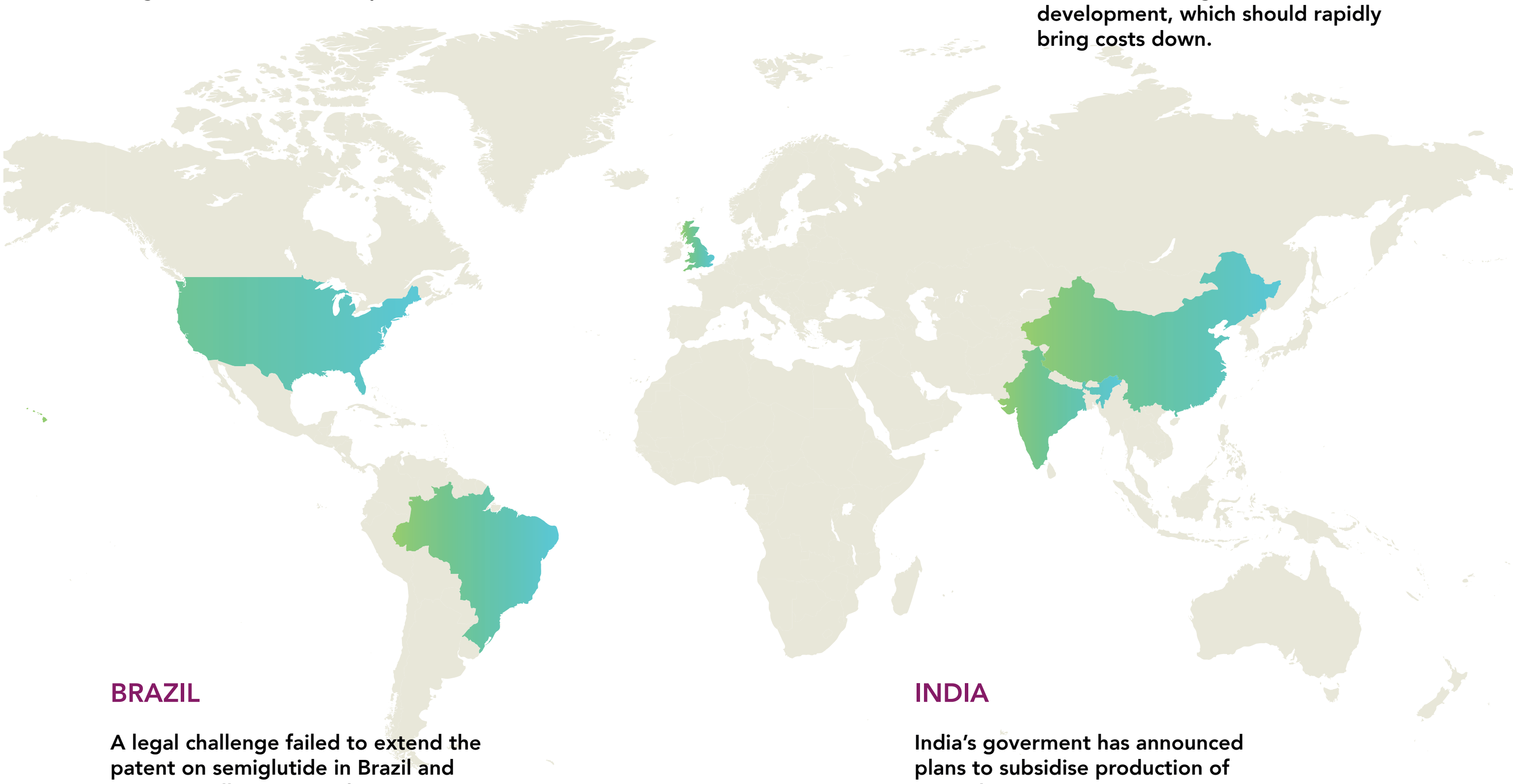
The US is currently the largest market for GLP-1s but patent protection on semaglutide lasts until 2032 and most insurance programmes will not cover obesity usage, which will slow adoption.

UK

Shortages in places such as the UK have slowed the adoption of GLP-1s for purely weight loss use, though many online pharmacies have continued to offer them to non-diabetics.

CHINA

Ozempic, Wegovy and Zapbound have all been approved in China, though are not covered by national insurance. Semiglutide's patent expires in 2026 and at least a dozen domestic generics are under development, which should rapidly bring costs down.



BRAZIL

A legal challenge failed to extend the patent on semiglutide in Brazil and generics will hit the market starting in 2026. The drugs are already so high-profile that a mayoral candidate in Rio de Janeiro made a campaign promise to make generic Ozempic available to all residents.

INDIA

India's goverment has announced plans to subsidise production of semaglutide once the patent expires in 2026, with an eye towards the export market though wealthier Indians are likely to also increase usage, which is already happening through back channels.

05

SPOTLIGHT ON BAKERY

05

Spotlight
on Bakery

Bakery and snack producers are confronting a demand downturn as GLP-1 users lose cravings for traditional sweets and carbs. Appetite suppression leads to smaller portions and fewer indulgences.

Many individuals on GLP-1 drugs report they "just aren't interested" in breads and cakes that once tempted them, or they feel satisfied after a couple of bites.

U.S. consumer data confirms this shift: after starting GLP-1 treatment, 46% of patients eat more whole foods like fruits and veg, but one-third have cut down on bakery items like biscuits, cakes and cookies.

Industry sales reflect these changes. Sweet baked goods have seen some of the sharpest declines – estimates suggest sales of cakes and pastries could fall ~9% as GLP-1 adoption spreads

Likewise, big snack brands are noticing softer demand for high-carb treats. In response, companies are racing to adapt their bakery offerings to align with healthier, smaller appetites.

Key strategies in bakery innovation include:

Reducing Portion Size

Many brands have introduced mini versions of products – think bite-sized brownies, half-length baguettes, and packs of two biscuits instead of six. Portion-controlled packaging is aimed at consumers who want a treat but physically can't (or won't) eat as much as before. For example, Mondelez reports success with downsized 100-calorie packs, which let GLP-1 users enjoy a snack without waste. Even fast-food chains are testing "snackable" baked desserts, anticipating more people will share or opt for the smallest size available.

Boosting Protein & Fibre

To make bakery items more nutritionally efficient, formulators are enriching recipes with protein isolates and dietary fibres. This addresses both satiety and muscle-preservation needs for those on GLP-1s. One food industry analyst notes that GLP-1 patients "consume more protein, fewer sugary foods, smaller portions" and want products with added nutrients

"Diet recommendations for people on anti-obesity meds include protein and fiber... The industry underestimated how many consumers would be taking these drugs."

Nicholas Fereday of Rabobank

Cutting Sugars & Refined Carbs

Lower-sugar, lower-GI ingredients are being used to replace traditional sugars and flours in bakery. Manufacturers are exploring sweeteners that have less impact on blood glucose, for instance, isomaltulose, which releases more slowly and even stimulates GLP-1 gut hormones naturally. The zero-calorie sweetener allulose is another popular choice, as it tastes like sugar but doesn't spike blood sugar. On the flour side, nut flours, resistant starch, and wholegrain blends are replacing white flour to lower net carbs and increase fibre. These changes make baked goods more compatible with the stable blood sugar that GLP-1 users seek

Enhancing Digestibility & Flavour

Some consumers on GLP-1s experience taste changes or nausea, so bakery R&D is also focusing on flavour and texture adjustments. Examples include mild or "less sweet" flavour profiles (to appeal to medication-altered taste buds), and super-soft textures that are easy to get down even if one isn't very hungry. Bakeries that adapt in these ways can still thrive. In fact, a new category of functional baked goods is emerging, targeting weight-focused consumers. Examples: ChipMonk Baking in the U.S. launched "GLP-1 Cookies," featuring a proprietary prebiotic fibre blend and just 1 g of sugar per cookie. Similarly, Two Spoons Creamery rolled out a "GLP-1 friendly" ice cream with zero added sugar (allulose-sweetened) and extra protein. These efforts indicate the bakery sector is pivoting from the traditional "bigger, sweeter, richer" mantra to a new ethos of "small, satisfying, functional."

New Product Launches

ChipMonk GLP-1 Cookies (USA, 2025)

Mini cookies with a high-prebiotic fibre blend and almost no added sugar (sweetened with allulose).

Healthy Choice "On Track" Meals (USA, 2025)

Frozen flatbread & pastry meals marked as GLP-1 friendly; each is high-protein, high-fibre, and under 300 calories.

06

SPOTLIGHT ON THE U.S

The United States with its high obesity rates and diet culture, has experienced a particularly intense "GLP-1 effect," surveys indicate over 30% would consider using one if eligible

Such is the demand that some insurers (and even employers) have started covering these expensive prescriptions. The result is a fast-growing user base that is collectively altering food consumption norms. U.S. grocery retailers and restaurants have begun reporting subtle changes in customer behaviour:

Smaller meal sizes

Many Americans on GLP-1s are ordering less when dining out, for instance, skipping appetisers, splitting main courses, or choosing kids' meal portions. In one poll, 40% of GLP-1 users said they have adjusted their diet and portion sizes to manage health while on the medication. Restaurants have responded by adding more half-portion options and nutrient-dense, lower-calorie menu items. Even fast-food outlets note an uptick in requests to "make it a small" rather than the usual upsells.

Healthier food choices

On the whole, U.S. consumers report eating better quality diets once on GLP-1 therapy. Sales data back this: supermarkets are moving larger volumes of produce, lean proteins, and low-carb products, whereas sales of sugary snacks and drinks are dipping. Vegetable and fruit intake is up (~59% of users), and previously indulgent categories like confectionery are down (around 27% of users cut back on sweets). This aligns with the drugs' effects, users often prefer "lighter, less greasy" fare since rich or sugary foods can cause discomfort on the medication

Reduced overall consumption

Perhaps the clearest trend is simply less food and drink consumed per person. Major retailers have noted slightly lower transaction volumes. Morgan Stanley analysts predict that if GLP-1 usage continues rising, U.S. supermarket sales could decline 1–2% in 2025 versus trend, due to reduced calorie intake among users. Early evidence supports this: large chain stores like Walmart observed smaller average basket sizes in areas with high Ozempic prescription fill rates. Likewise, convenience store operators report fewer purchases of impulse snacks. Over time, such shifts may pressure the revenue of companies heavily reliant on "more is better" consumption.

American companies are quickly pivoting to support consumers on GLP-1 therapy

Food brands are re-branding and formulating products as "GLP-1 friendly." For instance, in 2024 Conagra Brands added a special On-Track icon to 26 Healthy Choice frozen meals – highlighting high protein and fibre content suitable for those eating less on medication

Cereal and snack makers too are touting "high-protein, low-sugar" overlays on packaging, implicitly appealing to the Ozempic demographic. And weight-management programmes like WW (Weight Watchers) have launched add-ons specifically for members on GLP-1 drugs, focusing on tips for protein intake and dealing with side effects

Public health voices urge balance: Health officials in the U.S. emphasise that medication is "not a silver bullet" and should accompany diet and lifestyle improvements

"Drugs for obesity are important but must be part of a comprehensive approach. This is not a silver bullet,"

Dr. Francesco Branca of the WHO

In practice, many American doctors require patients to follow a nutrition plan or coaching programme alongside GLP-1 prescriptions. This has led to partnerships e.g. some clinics bundle consultations with dietitians or offer discounts on healthy meal kits for patients. The message is clear: the future of obesity care is an integration of medicine + healthier eating, not medicine alone.

The changes prompted by GLP-1 in America (more protein, more fibre, less sugar, smaller portions) align with prevailing nutrition goals for everyone. The coming years will show how much of the U.S. population transitions to this new pattern of eating, voluntarily or via prescription.

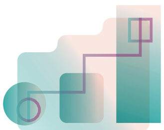
07

FUTURE PREDICTIONS

07

Future
Predictions

The impact of GLP-1 medications on the food landscape is unfolding across a continuum of change. From steady progression to radical reinvention, these scenarios reflect how consumer behaviour, industry strategy, and societal norms may evolve in response to widespread appetite control.



EVOLUTIONARY SCENARIO:

STEADY PROGRESSION

In this moderate scenario, GLP-1 therapies become a routine part of obesity care, gradually reshaping food habits and industry norms. The change is cumulative, building on existing wellness trends rather than disrupting them.

Consumer Behaviour

More people eat smaller portions and prioritise protein and fibre, but many traditional habits persist. GLP-1 users influence household shopping, even among non-users.

Industry Response

Food companies double down on "better-for-you" innovation, such as high-protein breads, fibre-enriched yoghurts, and portion-controlled snacks become standard. Reformulation is subtle, avoiding niche labelling while meeting satiety needs.

Marketing Shift

Messaging pivots from restriction to empowerment. Products are sold on their nourishing qualities "Complete Nutrition in a Small Bowl" replaces "diet cereal."

Economic Strategy

With volume growth slowing, brands pursue premiumisation. Fewer units sold, but at higher value. Governments and insurers monitor outcomes, potentially expanding support if healthcare costs decline.

The first generics and adoption of a pill format. More powerful versions of existing drugs, pill formats and generics will all hit the market in the next two years, expanding the impact of these drugs further. The largest question will be regarding coverage from governments and insurers. Usage may expand considerably and consistently drag food and beverage volumes, albeit amidst many other volume pressures, such as tariffs, this could be lost in the shuffle.

This scenario reflects a moderate trajectory: the food system evolves without upheaval, nudging consumers and companies toward healthier norms.

TRANSFORMATIONAL SCENARIO:

DEEPER RESHAPING

Here, GLP-1 usage becomes widespread enough to fundamentally alter how society approaches food, health, and supply chains. The shift is proactive and coordinated, driven by strategic adaptation.

Worldwide Expansion and Serious Volume Hits

GLP-1 generics entering the market between 2027–2032 will dramatically expand access, especially in developing markets like China and Brazil. This surge will drive tens of millions of new users, triggering widespread disruption in food consumption patterns and pressuring traditional volume-based business models.

Food Systems

Nations invest in climate-smart infrastructure and regional supply blocs to meet demand for protein and fibre. Trade patterns shift from refined carbs to nutrient-dense ingredients.

Policy Support

Governments incentivise low-sugar, high-fibre foods and fund sustainable agriculture. Certification schemes for "GLP-1 conscious" products emerge.

Rise of Functional and Personalised Foods

Subscription-based meal services tailored to GLP-1 users will flourish. Pharma-food partnerships may emerge, offering bundled solutions; medication plus matched nutrition

Wellness and Maintenance Focus

As weight loss stabilises, demand will shift to maintenance products e.g., snacks that prevent hunger spikes or fortified foods for bone health

Industry Shake-Up

Legacy players may consolidate or pivot, while agile newcomers thrive. Empathy and speed will be critical to capturing loyalty in this redefined market

Tech Integration

AI meal planners, smart kitchen devices, and personalised nutrition apps become common. Consumers maintain balanced diets despite eating 30% fewer calories.

Retail Evolution

Supermarkets reorganise by health function "High-Protein Centre," "Wellness Pantry" rather than traditional categories.

This scenario envisions a food industry that has re-engineered itself to support healthier living, with benefits extending to public health and environmental sustainability.

REVOLUTIONARY SCENARIO:

RADICAL REINVENTION

In this extreme scenario, GLP-1 adoption coincides with disruptive shocks, technological, geopolitical, or environmental that force the food system to reinvent itself rapidly.

Collapse of Indulgence Categories

Sales of sugary snacks and oversized portions may plummet. Brands will be forced to reinvent legacy products or risk obsolescence

Breakthrough Therapies

A new obesity cure (e.g. gene editing or next-gen pills) could compress a decade of change into months. Demand for traditional foods collapses; only agile firms survive.

Geopolitical Shocks

Trade wars or uneven drug access create imbalanced markets. Governments impose sugar taxes or ration food, accelerating reformulation and innovation.

Industry Overhaul

Legacy brands face bankruptcy or consolidation. Radical product pivots e.g. confectionery giants reformulating for protein and fibre etc., become essential.

Food as Healthcare

Doctors may prescribe nutrition plans alongside medication. Insurance could cover medically recommended grocery bundles. "Meals as Medicine" becomes mainstream

Cultural Norms Shift

Smaller appetites redefine social expectations. Portion sizes shrink, snacking declines, and mindful eating becomes the norm

Food Economy Reimagined

Agriculture may pivot to protein-rich crops. Food multinationals diversify into health services, blurring the line between food and pharma

Environmental Gains

Reduced overproduction and food waste could lower emissions and support sustainability goals

The reaching of equilibrium

At some point prices will stop falling once patent protections expire around the world and economies of scale are reached. From then on, usage growth will slow dramatically. Many consumers will simply never want to use these even if they are affordable. The likely endgame is something like Prozac and similar drugs in mental health treatment, namely some people will swear by them, some will go on and off, and some will stay highly sceptical and prefer other treatment options.

This scenario is defined by volatility and urgency. The food system is reshaped not by planning, but by survival, with innovation driven by necessity and speed. This phase envisions a coordinated evolution, where medicine, food, and policy converge to support healthier living at scale.

Conclusion

It's important to note that this optimistic vision assumes GLP-1 therapies remain effective, safe, and accessible. Challenges could arise: the body's adaptation might reduce drug efficacy long-term, or side effects (like gastrointestinal issues) could limit tolerability for some. Cost is another factor these drugs are expensive, and if cheaper generics or alternatives don't materialise, broad global access may be limited.

GLP-1 usage might plateau at, say, 10–15% of the population, leaving many still struggling with obesity without aid. In that case, the food industry would still cater to a dual market, one part following the new pattern, another part still consuming larger amounts of traditional high-calorie foods.

However, even a moderate adoption of GLP-1 is already forcing change, and those changes align with public health objectives that are likely here to stay. The momentum behind high-protein, high-fibre, low-sugar, portion-controlled eating is strong and will not reverse, because it's driven not only by medication but by awareness of healthy lifestyles. Even if GLP-1s aren't a panacea, they've accelerated a shift toward more health-driven food models. As major players like Nestlé and Unilever pursue acquisitions and partnerships with nutrition-tech firms to deliver integrated solutions, the line between food and pharma will only grow thinner

The future of GLP-1 is still being written, but its first chapters have already driven home a clear message: when people gain a powerful tool to control their appetite, the entire food ecosystem must respond. In the coming decade, that response balancing empathy for consumers' new needs with innovative product strategies will determine which companies lead in the next era of wellness and which get left behind.

The opportunity is immense for those who adapt. As one market outlook noted,

"Brands that act with empathy and speed stand to build lasting loyalty in a rewritten market"

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About Horizon 10

Horizon 10 explores the emerging opportunities and challenges set to shape the future of food, markets, and technology over the next decade.

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