



THE GLP-1 PLAYBOOK

HAINES

THE GLP-1 PLAYBOOK

HOW TO THRIVE IN FOOD & DRINK WHEN APPETITE DISAPPEARS



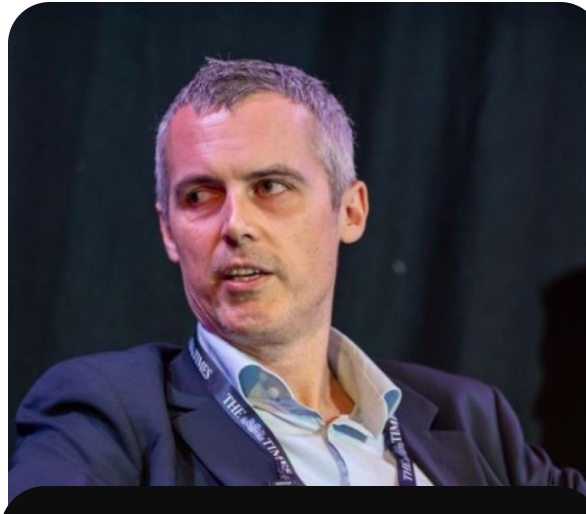
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GLP-1
ADOPTION & EFFECTS

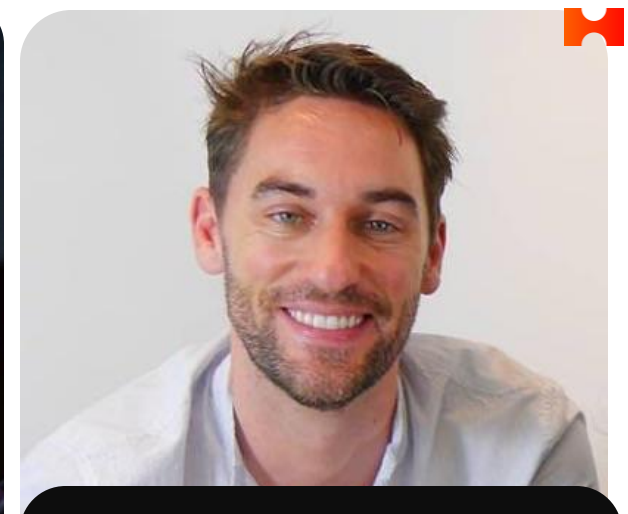
THE
CULTURAL CONTEXT

KEY IMPLICATIONS FOR
CPG BRANDS



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MINTEL



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Nutritionist & Author



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THE APPETITE REVOLUTION HAS BEGUN

Glp-1 is rewiring how our society thinks about hunger, health and control – reshaping not just our diets, but the way we interact with both food, drink and each other.



THE BIG QUESTION FOR BRANDS

**HOW DO YOU PREPARE NOW
- BEFORE DISRUPTION SCALES?**

\$50BN

Global market in 2024, expected to triple by 2030

1 in 8

Of US adults have used GLP-1 drugs (12%)

2x

As many UK adults are using GLP-1 drugs in 2025 vs. 2024 (8%)

Source: Mintel

BUT WHAT HAS LED US TO **THE TIPPING POINT?**

GLP-1 drugs aren't a new phenomenon. Originally formulated for diabetes treatment, GLP-1 has entered the cultural zeitgeist as a weight loss drug for those struggling with obesity.

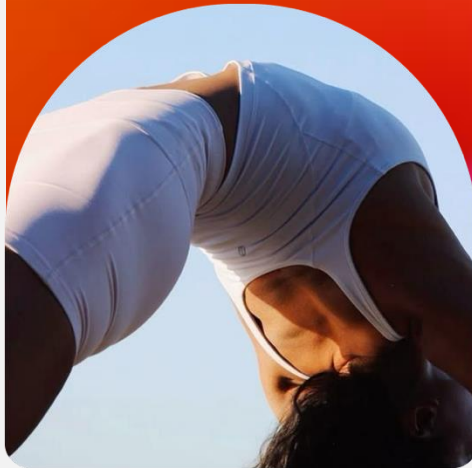
OBESITY EPIDEMIC

Rates of obesity have tripled since 1975 and this has become the defining public health concern of modern life – with both brands and governments aiming to tackle the issue.



WELLNESS CULTURE

Influenced by a rising focus on health and a sense of control, consumers are taking their health into their own hands and moving from reactive medicine to proactive living.



SELF-OPTIMISATION

Coined as the 'cult of self-discipline', modern culture celebrates morning routines, micro-habits and biohacking as status and identity markers.



AESTHETIC OF RESTRAINT

From stricter routines to smaller plates, thin ideals are resurging on platforms like TikTok where stricter diet norms are amplified and supplements promise smaller appetites.



SHIFTS IN BODY POSITIVITY

Size inclusivity has plateaued, with the number of fashion looks using plus-size models dropping sharply - from 0.8% in Spring/Summer 2025 to 0.3% by Autumn/Winter.



GLP-1 USERS CONNECT WITH FOOD IN A DIFFERENT WAY

What do GLP-1 injections
actually do to the body?



CONSUMERS ARE TYPICALLY
LOOKING FOR LIGHTER
FLAVOURS BECAUSE
HEAVIER FLAVOURS AND
TEXTURES CAN BE TOO
HEAVY ON THEIR SYSTEMS

Caroline Withers, Product Experience Leader, Britvic



REDUCES FOOD NOISE

GLP-1 quietens the constant
mental chatter about eating and
food fades into the background

MINIMISES CONSUMPTION

Users eat slower, smaller
and less often

LOWERS CRAVINGS

Turns off the urge to seek and
snack, with appetite coming
optional and not instinctive

CHANGES TASTE

Alters flavour perception, with
rich, sugary and fatty foods losing
their appeal in favour of fresh,
protein-dense alternatives

REWIRES EMOTIONAL CONNECTION

Weakens the link between food
and comfort, with eating feeling
more functional than emotional

BUT LOW APPETITE LIVING COULD BECOME THE NORM FOR THE MANY, NOT THE FEW

*GLP-1 drugs are only one expression of a much broader shift toward **low-appetite lifestyles** spanning medicine, wellness, and mindset.*



Appetite-suppressing wellness aids

“Natural GLP-1 mimics” are booming across TikTok and the wellness market, such as Kourtney Kardashian’s brand Lemme launching GLP-1 vitamin supplements

Intermittent fasting

Nearly 1 in 5 U.S. adults now practice some form of fasting, positioning restraint as a normalised daily behaviour

Alternative eating movements

From the carnivore diet’s radical simplicity to plant-based minimalism and clean-label eating, trending diets all orbit around discipline, control, and “less”

Sources: Cleveland Clinic | Yahoo Life

LEADING TO A POPULATION OF USERS WITH **SPLIT** MOTIVATIONS

As adoption grows and culture amplifies the lifestyle and identity benefits of rapid weight loss, we see two distinct groups emerging: those driven by **longevity** and those driven by **image**.

This divergence creates both risk and responsibility for brands. **Brand must shape the narrative, not chase it** – guiding behaviour with credibility, empathy and education to support a positive narrative for consumers.



“ YOUNGER PEOPLE 18–34 ARE TWICE AS LIKELY TO BE ON GLP-1 BUT STATISTICALLY MUCH LESS LIKELY TO BE OBESE. IT IS ACTUALLY A LOT ABOUT LOOKS AND GETTING THAT BEACH BODY

Jonny Forsyth, Food & Drink Analyst, Mintel

”

LIFESPAN & DISEASE PREVENTION

VS.

LIFESTYLE & AESTHETICS

“THIS COULD BE THE
MOST DISRUPTIVE
EVENT FOOD &
DRINK HAS EVER
EXPERIENCED, BUT
THAT’S A **BIG IF.**”

JONNY FORSYTH, FOOD & DRINK ANALYST, MINTEL

Considering market dynamics and cultural nuance is important.

Whilst GLP-1 is rapidly expanding in the US, stricter regulations may slow down the roll out across Europe.



**GLP-1 MIGHT BE
RE-DEFINING
THE GAME...**

BUT THIS OPENS
UP THE FIELD
FOR BOLD BRANDS
TO EVOLVE AND WIN.





WE SEE 4 BIG SHIFTS HITTING THE **FOOD & DRINK** INDUSTRY

FLAVOUR & INDULGENCE RE-WIRED

With users drawn to freshness, lightness, and different flavours - pleasure is no longer about excess; it's about precision.

FUELING GATHERINGS

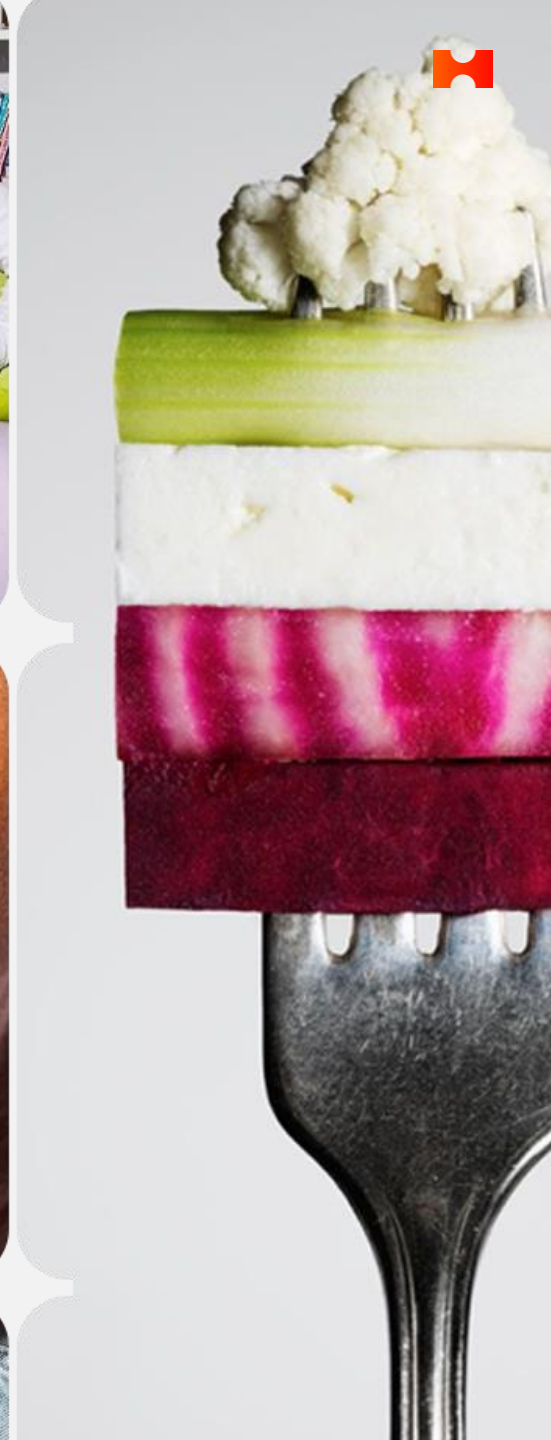
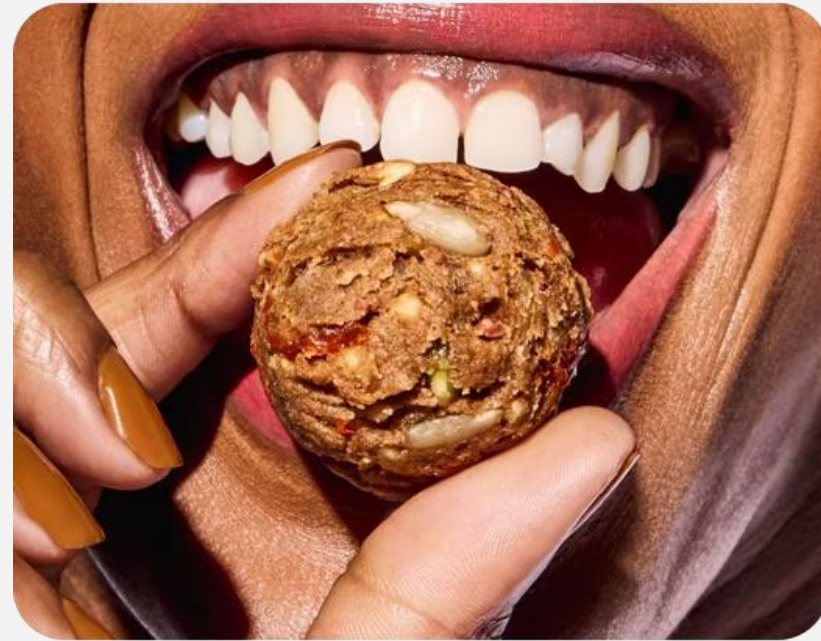
As appetite fades, the rituals that create joy, ritual and belonging take new forms.

FRAGMENTED MEALTIMES

Traditional meal occasions are dissolving into smaller, more functionally-driven eating moments.

LOST IDENTITIES

Consumers who once identified as 'foodies' are not only turning to new categories - but searching for fresh meaning.



DEPENDENT ON
THE SCALE AND
DISRUPTION OF
GLP-1 IN YOUR
CATEGORY, **YOUR
STRATEGY
SHOULD VARY.**

01**01
DEFEND****RISK MANAGEMENT**

Mindset: Be proactive,
but not panicked. Watch
and adapt to the signals.

02**02
EVOLVE****ADAPTIVE EVOLUTION**

Mindset: Stay true to your
brand through small,
smart innovations and
flexible pipelines.

03**03
REIMAGINE****PROACTIVE GROWTH**

Mindset: Lead the narrative
on what eating, drinking
and indulgence mean in a
world of low appetite.

LET'S BREAK IT DOWN...



01 | DEFEND

GOAL

Protect brand equity, emotional relevance and short-term performance while the market is still developing.



TACTICS

- Double down on emotional branding, defending occasions, joy and connection that GLP-1 threatens to shrink
- Ensure core SKUs remain relevant to lighter or mindful consumption
- Begin to own the health narrative by educating around mindful eating
- Set up consumer listening and feedback loops to track category adoption closely



02 | EVOLVE

GOAL

Evolve your core portfolio and comms to meet emerging needs.



TACTICS

- Re-think consumption occasions, from meals and snacks to nutrient-dense mini meals
- Re-balance portfolios toward satiety, hydration and mindful indulgence
- Innovate within your core – lighter formats, aerated textures, flavours that combat side-effects i.e. mint, cucumber, umami



03 | REIMAGINE

GOAL

Create new sources of growth as the category reshapes.



TACTICS

- Explore new business models - M&A or partnerships in nutrition, pharmaceutical or functional health companies
- Define your strategy to re-define indulgence and social food culture
- Lead on education and health equity, helping consumers make the most of eating less
- Build the future category through functional formats, smaller packs, and nutrient dense innovation



GLP-1 PLAYBOOK ACTION SESSION

Understanding how you can act on these shifts is key to winning in a changing market.

We've deep-dived into each key shift and developed actionable guidance on how to respond to key CPG shifts caused by GLP-1.

We'll tailor our DEFEND, EVOLVE, REIMAGINE framework to help you and your team feel ready for the future of your category.

DEFEND - EVOLVE - REIMAGINE



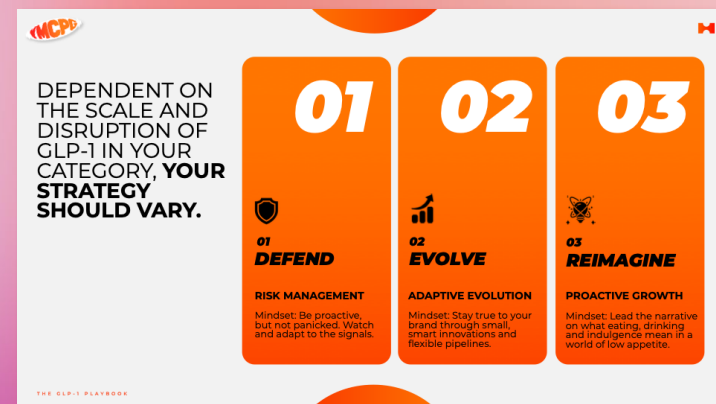
1 HOUR
SESSION



ONLINE



FREE OF
CHARGE





THE GLP-1 PLAYBOOK

HAINES