



Designing Companion Products to Meet the Needs of GLP-1 Users

June 4, 2025

Consumers are Bombarded with Diet Noise

Eat Many Small Meals Throughout the Day

Reduce Calories

Eat Regular Meals

Increase and Eat a Variety of Fruits & Vegetables

Practice Intermittant Fasting

Follow a Keto or Paleo Diet

Limit Trans & Saturated Fat

Consume an 'Optimal' Amount of Dietary Protein

Increase Fiber Intake

Stay Hydrated

Limit Ultra-Processed Foods

Limit Alcohol, Sodium, Sugar and Caffeine



‘Globesity’ on the Rise¹

Worldwide
adult obesity
has more than
doubled since 1990.



Adolescent
obesity has
quadrupled.

In 2022, **43%** of
adults were
overweight and
16% were living with
obesity.



Source: WHO News on Obesity and Overweight, May 2025 - <https://www.who.int/news-room/fact-sheets/detail/obesity-and-overweight>

GLP-1 RAs – An Overview

WHAT ARE THEY?

GLP-1 Receptor Agonists **mimic a natural hormone** in the body **GLP-1** (glucagon-like peptide-1) **responsible for regulating blood sugar levels and appetite.**

HOW DO GLP-1 MEDICATIONS WORK?

- Slow down digestion → Feel full longer
- Signal the brain to reduce hunger → Eat less
- Stimulate insulin release → Lower blood sugar

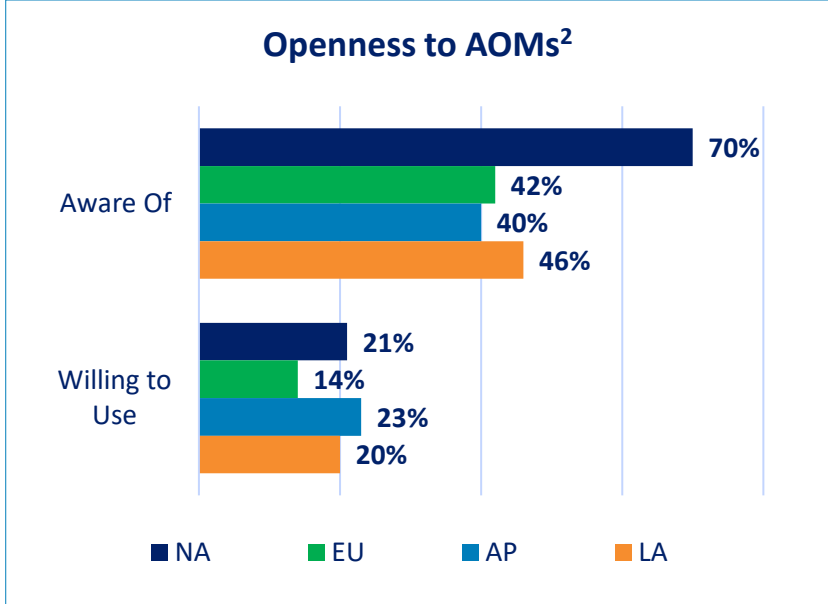
WHY ARE THEY USED?

Originally developed for people affected by **type 2 diabetes**, GLP-1 RAs are now widely used for **obesity** and **weight management**. They are effective even in non-diabetic individuals.





47% of
GLP-1 RA Users
in EMEA Take
Them for
Weight
Management¹



1- ADM OUTSIDE VOICESM, Global Lifestyles Survey, Q1 2025.
2- FMCG Gurus, 2025.

70% Eat Less After Starting Treatment with AOMs

- Nausea
- Vomiting
- Diarrhea
- Constipation
- Muscle Wastage

Source: ADM OUTSIDE VOICE™, Global Lifestyles Survey, Q1 2025.



Key Consumer Needs Create Opportunity Along the AOM Journey



During Use of an AOM for Weightloss



MUSCLE HEALTH



MINIMIZE GI DISCOMFORT



HYDRATION

The First 6 Months After Ramping Down



SATIETY



PREVENTION OF WEIGHT REGAIN



1/3 of AOM Users Claim to Cook More at Home and Go Out Less

Source: ADM OUTSIDE VOICE™, Global Lifestyles Survey, Q1 2025.

- Sweet Bakery
- Nuts & Seeds
- Beer
- Desserts
- Bread



- ✓ Alcoholic Mixers
- ✓ Beans
- ✓ Tea
- ✓ Ready Meals
- ✓ Vegetables



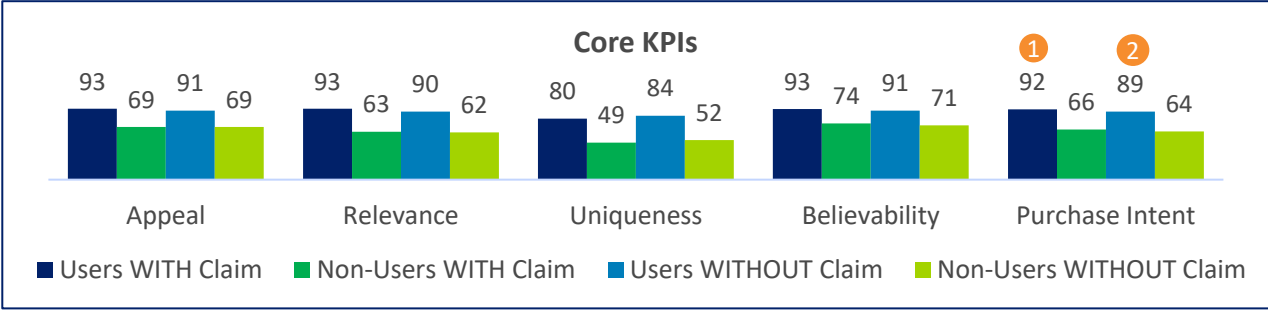


**Taste
Is (Still)
King**

On-Pack GLP-1 Claims Drive Purchase

Among users of the drug without alienating non-users

- 1 Users show much higher positive response and purchase intent than non-users
- 2 Users react positively even without the GLP-1 claim, picking up on supportive cues like high protein
- 3 Protein claims resonate broadly; GLP-1 claims make the message feel more personal to users
- 4 No major negative reactions to the GLP-1 claim among non-users



Ranking, most motivating	User	Non-User
GLP-1 Friendly	1	6
High Protein	2	2
17g of Protein	3	1
250 Calories	4	3
No Preservatives	5	4
4g of Fiber	6	5

4

Does / is the claim (top 2 box)...	Users	Non-Users
Clarity: Clear and easy to understand?	92	60
Differentiation: Make product stand out?	90	43
Believability: Feel credible?	88	57
Health: Make the product seem healthier?	87	56

Source: ADM OUTSIDE VOICESM: Proprietary Claim Test conducted in April 2025

Plant-based Foods Strongly Associated with AOM / Weight-related Issues

- **80%** of consumers say **plant-based** is **better** for **maintaining weight**
- **76%** say **plant-based** make it **easier** to **lose weight**
- **4 out of 5** consumers agree **soy protein** is a **healthy way** to **reduce fat** and **build muscle**







Source: ADM OUTSIDE VOICESM, Protein Discovery Study, Q1 2025.



How Brands Can Capitalize on the Opportunity

1

Select a high-potential category

-  Specialized Nutrition
-  Ready Meals
-  Yogurt & Yogurt Drinks
-  Beverage
-  Meal Replacement
-  Bars & Snacks

2

Choose the appropriate brand strategy



3

Innovate against at least one of the five key consumer needs

-  Muscle Health
-  Minimize GI Discomfort
-  Hydration
-  Satiety
-  Prevention of Weight Regain

Choose the right partners so you can get to market quickly



Deep Understanding of Consumer Needs

During the use of an AOM for weight loss

The first six months after discontinuing/ramping down an AOM



ADM's Edge

Ingredient portfolio to address each need

Fast-cycle, full-formula Product Development capability

Science-backed claims guidance



Leading Innovation

You get to market faster with winning innovation



Thank You!



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