

# ADAPTING APPETITES



Meet the GLP-1  
consumers driving  
impact

The Trailblazing  
Trendsetter

The Dynamic  
Dad

The Future-Focused  
Improver

The Steady  
Sticker

The Balanced  
Maintainer

**KERRY**

The Future of Sustainable Nutrition

# AGENDA



**Adapting Appetites**

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**INTRODUCTION**

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**WHO IS THE GLP-1 CONSUMER?**

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**GLP-1 CONSUMER-FRIENDLY CONCEPTS**

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# RESEARCH OBJECTIVES & METHODOLOGY



Research  
Objectives

## Research Objectives

- + Develop a deeper understanding of the current and future state of GLP-1 consumers
- + Ascertain the current and potential impact of GLP-1 on consumer food, beverage, and supplement purchasing behaviors and priorities.
- + Using consumer survey data, Develop future state hypotheses to innovate across food, beverage and supplements.

## Methodology

- + Quantitative Only Survey
- + US National Demographic Representation
- + Screening Criteria  
At least somewhat familiar with GLP-1 type drugs
- + GLP-1 Group Qualifications  
Considering in next 12 months  
Recently Started (<3ms)  
Long-term Current (>3ms)  
Recently Stopped (<3ms)  
Long-term stopped (>3ms)

## Sample Breakout

- + 2,642 Total responses
- + 615 Considering
- + 1,208 Current GLP-1 Users  
602 Recently Started GLP-1  
606 Long-term Current GLP-1 Users
- + 819 Prior GLP-1 Users  
451 Recently Stopped GLP-1  
368 Long-term Stopped GLP-1 Users
- + 1,087 Diabetes Control
- + 1,555 Weight Loss/Appetite Suppression





There's no such thing as an

# AVERAGE GLP-1 CONSUMER

...but there are some "need-to-knows"

Top Behaviors

## ⊕ GLP-1 users are experiencing...

- Eating & Drinking less than before
- Interested in weight-loss, and long-term health
- Maintaining a balanced diet
- Maintaining a balanced budget

## ⊕ GLP-1 users are seeking...

- Food & beverages that support their dietary changes and nutritional needs
- Hero ingredients designed to offer specific health benefits
- Functional benefits without sacrificing taste



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# Supplementing the **GLP-1** WEIGHT-LOSS JOURNEY

## Top Needs

- Brain/Cognitive Health
- Energy Support
- Digestion/Gut Health
- Cardiovascular Health
- Heart Health
- Immunity/Immune Support
- Alertness and Focus

## Top Concerns

- Rising cost of living
- Cost of food & drinks
- Food Safety

**90%**  
of GLP-1 consumers  
currently take vitamins  
or supplements

GLP-1 consumers are  
looking to add value for  
their longer-term health

**2/3**  
of GLP-1 users now  
**PRIORITIZE ALL  
NEED STATES**  
with even more  
emphasis on  
weight loss &  
metabolic  
health





Foodservice

▲ More Than Before



▼ Less Than Before



Grocery

▲ More Than Before



Meal Replacement Drinks



Functional Waters

▼ Less Than Before



Supplements

▲ More Than Before



Dietary Supplements



Herbal Supplements

## NEW NEEDS & BEHAVIORS

### Are Driving New Purchasing Habits

Purchasing changes in foodservice, retail and supplements are showing how the GLP-1 consumer is trying to maintain a balanced diet, as well as a balanced budget. This snapshot of purchases from the last 30 days, gives insight into current habits, changing habits, and opportunities for these GLP-1 consumers.

## MEAT & DAIRY ALTERNATIVES

Although Meat Alternatives/ Plant-Based Meat and Dairy-Free/ Non-Dairy products represent a comparatively smaller share of overall purchase habits, they do feature prominently in the shopping baskets of some GLP-1 consumers.

# PURCHASING SHIFTS



The Five Unique GLP-1 Consumers

# ONE-SIZE DOESN'T FIT ALL



From the data collected from our 2,642 study participants, we found that people cluster around different attitudes and behaviors, falling into five unique groups that span the full GLP-1 usage journey.





# DYNAMIC DAD

These busy, family-focused dads balance health goals with packed schedules. They've kickstarted weight loss with GLP-1s and now focus on maintaining momentum with exercise, balanced diets, and quality sleep. High-energy, on the-go lifestyles mean portable, protein-packed options are essential.



**Name:** *Dave Harrison*

**Age:** *42*

**Location:** *Dallas, TX*

**Family Structure:** *Married with two children, ages 7 & 10*

**Occupation:** *Regional Sales Manager*

**Household Income:** *\$135,000/year*



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# Chili Cheese Protein Curl

## Chili Cheese Protein Curl with Probiotics

Give weigh loss focused consumers a healthy snack alternative with a taste they recognize. These snack puffs feature high quality dairy protein, with collagen from chicken broth to provide benefits needed to sustain a healthy lifestyle.

## Product Features

### *Health Benefits*

- High quality dairy protein
- Collagen from bone broth
- BC30™ Probiotic

### *Other Benefits*

- Gluten free
- Non-GMO

### NUTRITIONAL FACTS (per 28 g serving)

Calories  
120

Fat  
3 g

Carbs  
7 g

Sugar  
1 g

Protein  
15 g



CONTAINS MILK



# TRAILBLAZING TRENDSETTER

These wellness-savvy urbanites are always ahead of the curve. Weight loss and maintenance are critical, alongside improving mental clarity, energy, and immunity. Regularly tracking health, working with nutritionists, and shopping natural grocers, they embrace functional foods, plant-based options, and nutritional beverages for smarter, healthier living.

**Name:** *Jordan O'Hara*

**Age:** 38

**Location:** *Brooklyn, NY*

**Family Structure:** *Married with one child*

**Occupation:** *Graphic Designer*

**Household Income:** *\$85,000/year*





# Strawberry Yuzu Stress Relief



## Refreshing, yet Calming Stress Relief Drink

This potent stress supplement drink helps your body cope with everyday stress by maintaining healthy cortisol level, supported by a patented Ashwagandha extract Sensoril, and rejuvenate your day with a refreshing strawberry and yuzu flavor.

## Product Features

- Mood Support
- Stress management
- Metabolic health
- Natural Flavors
- Reduced Sugar
- Low Calorie

### SUPPLEMENT FACTS (per 8 fl oz.)

Calories  
10

Fat  
0 g

Carbs  
3 g

Fiber  
0 g

Sugar  
1 g

Protein  
0 g



# BALANCED MAINTAINER

Gen Z'ers in suburban households who've recently ended their GLP-1 journeys. With weight loss goals largely achieved, they've shifted to maintenance mode—minimal changes to eating habits, despite healthcare recommendations for nutritional support. Their focus remains steady but practical.



**Name:** *Emily Taylor*

**Age:** 28

**Location:** *Charlotte, NC*

**Family Structure:** *Lives with parents and two siblings*

**Occupation:** *Social Media Specialist*

**Household Income:** *\$55,000/year*



# Meal-Replacement Dairy Beverage

## Mocha Coffee Meal Replacement Dairy Beverage

This high-protein meal replacement shake is perfect for the busy Gen Zer. With a coffee flavor for a caffeine boost and packed with protein to meet daily goals, it's lactose-free, and reduced-sugar.

## Product Features

- Caffeine Boost
- High Protein
- Lactose-Free
- Sugar-Reduced
- Convenient format
- Part of his every-day routine





# FUTURE-FOCUSED IMPROVER

These are health-conscious Southern Gen X women at the start of their GLP-1 journeys. Focused on long-term health and aging well, they've made intentional changes—less dining out, more activity, and a sharper eye on brain and digestive health. A proactive mindset, but supplement use remains low for now.



**Name:** Susan Williams

**Age:** 49

**Location:** Atlanta, GA

**Family Structure:** Divorced, lives alone

**Occupation:** High School Teacher

**Household Income:** \$70,000/year



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# LACTOSE FREE MAPLE DONUT CREAMER

## Lactose Free, Low Sugar Creamer

Transform your everyday coffee into a moment of indulgence with a lactose free Maple Donut Creamer – a little luxury that brings the warm, sweet taste of freshly baked donuts to your cup, turning the ordinary into extraordinary.

## Product Features

- Reduced Sugar
- Natural Flavors
- Lactose-free

NUTRITIONAL FACTS  
(per 1 Tbsp serving)

Calories  
25

Added Sugar  
3 g

**41.7%**  
**REDUCED SUGAR**  
compared to standard sugar  
levels in creamers





# STEADY STICKER

These practical and budget-conscious Midwestern women stick to what works. Having ended their GLP-1 journeys, they prioritize weight maintenance through familiar foods and routines. Supermarkets and casual dining fit their smaller households, as they focus on steady, long-term health without chasing trends.



**Name:** Linda Jefferson

**Age:** 52

**Location:** Des Moines, IA

**Family Structure:** Empty nester, lives with her husband

**Occupation:** Administrative Assistant

**Household Income:** \$75,000/year



For GLP-1 Consumers...

# ONE-SIZE DOESN'T FIT ALL

## 5 Consumer Segments

- Future-Focused Improver
- Trailblazing Trendsetter
- Balanced Maintainer
- Dynamic Dad
- Steady Sticker

## Varied Health & Wellness Needs

- Balanced Nutrition
- Positive Nutrition
- Personalized Nutrition

## Targeting & Innovation

*Which segment best fits with YOUR ...*

- Product(s)
- Brand(s)
- Messaging





# CONTACT INFORMATION



**SARAH MILLER**

Marketing Insights Director,  
North America

[sarah.miller@kerry.com](mailto:sarah.miller@kerry.com)



# Q&A

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