Retail Product Innovation Insights:

Catering to Consumers with Food Allergies and GLP-1 Users

Kathy Risch, SVP, Shopper Insights & Thought Leadership

October 22, 2025

acosta group

Acosta Group owns and maintains a proprietary Shopper Community of over 40,000 U.S. household shoppers who provide feedback on what drives their shopping and consumption behaviors – insights which brands and customers need to solve critical business issues.

acosta

ActionLink

CORE

CROSSMARK

mosaic

Premium.

PRODUCT CONNECTIONS

Acosta Group Shopper Community

Acosta Group's proprietary community for survey engagement in the U.S.

- Can target consumers based on topic, objective, industry, channel, category, etc.
- Members are engaged to participate with incentive points program
- Ongoing maintenance and strict measures taken to maintain community quality and integrity
- Ability to add incremental, hard to reach segments / samples

40K+ participants

18+ age

Diversity Across ages, genders, ethnicities

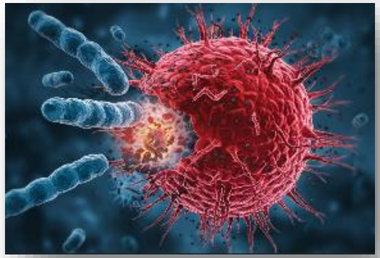
FOOD ALLERGIES, INTOLERANCES, AND SENSITIVITIES

acosta group

Food allergies and sensitivities target antibodies in the immune system, while a food intolerance affects digestion

	Food Allergy	Food Sensitivity	Food Intolerance
Mechanism	Immune system reaction *IgE Antibodies*	Complex immune system involvement *IgG, IgA, IgM Antibodies*	Digestive enzyme deficiency, inability to process certain substances
Symptoms	Ranges from mild to fatal; includes hives, swelling, and anaphylaxis	Includes headaches, fatigue and digestive problems	Digestive discomfort such as stomachache, bloating or gas.
Onset	Immediately after exposure	Delayed, hours to days post-exposure	Gradual, often after consuming large quantities
Example	Peanut allergy	MSG sensitivity	Lactose intolerance

Please note that in this survey when we discuss *Food Intolerances* or *Food Sensitivities*, we will simply refer to them as **Food Intolerances**.



Source: Harvard Health

FDA guidelines and regulations around labeling are evolving to meet growing consumer needs…

Allergen-free foods: Why clear labeling is crucial to tapping into trend

Food and beverage manufacturers must know the difference between voluntary and mandatory allergen labeling to ensure consumers understand their exposure risk

FoodNavigator USA

US FDA responds to the growth of alt-protein with new labeling guidelines

SeafoodSource

FDA outlines allergen labeling dos, don'ts

Improper food allergen labeling can hurt consumers' health and cost CPG companies millions

FoodNavigator USA

FDA says it will phase out petroleum-based food dyes, authorize four natural color additives

CNN Health

1-in-10 of those with food intolerances cannot process **artificial dyes**

Source: Living Allergic, Food Navigator USA, Seafood Source, Axios acosta group | Shopper Insights

The Suffering Shopper Journey

Through Food Allergies, Intolerances, and Sensitivities

Objective:

To understand specific challenges and considerations faced by individuals with food and beverage allergies, intolerances and sensitivities. *(HBC also included)*

Specifically addressed:

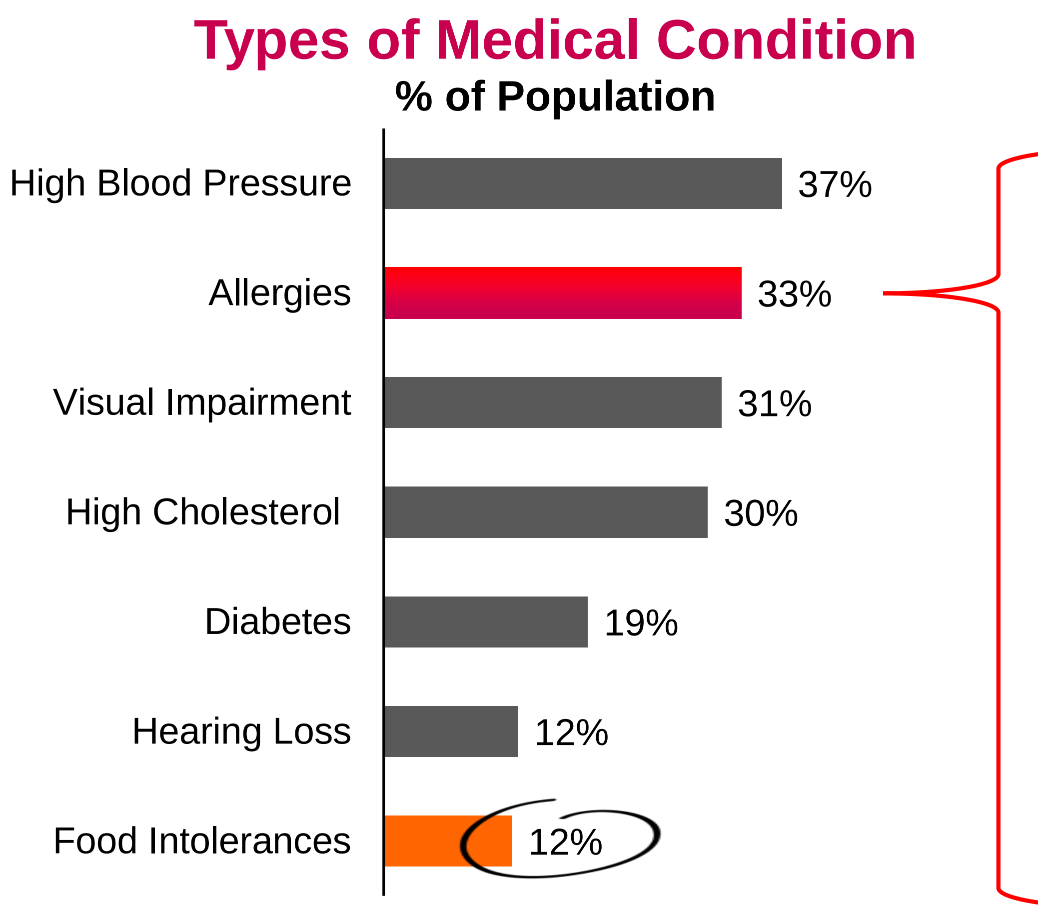
Symptoms, product needs, shopping habits, knowledge, label clarity, retailer preferences.

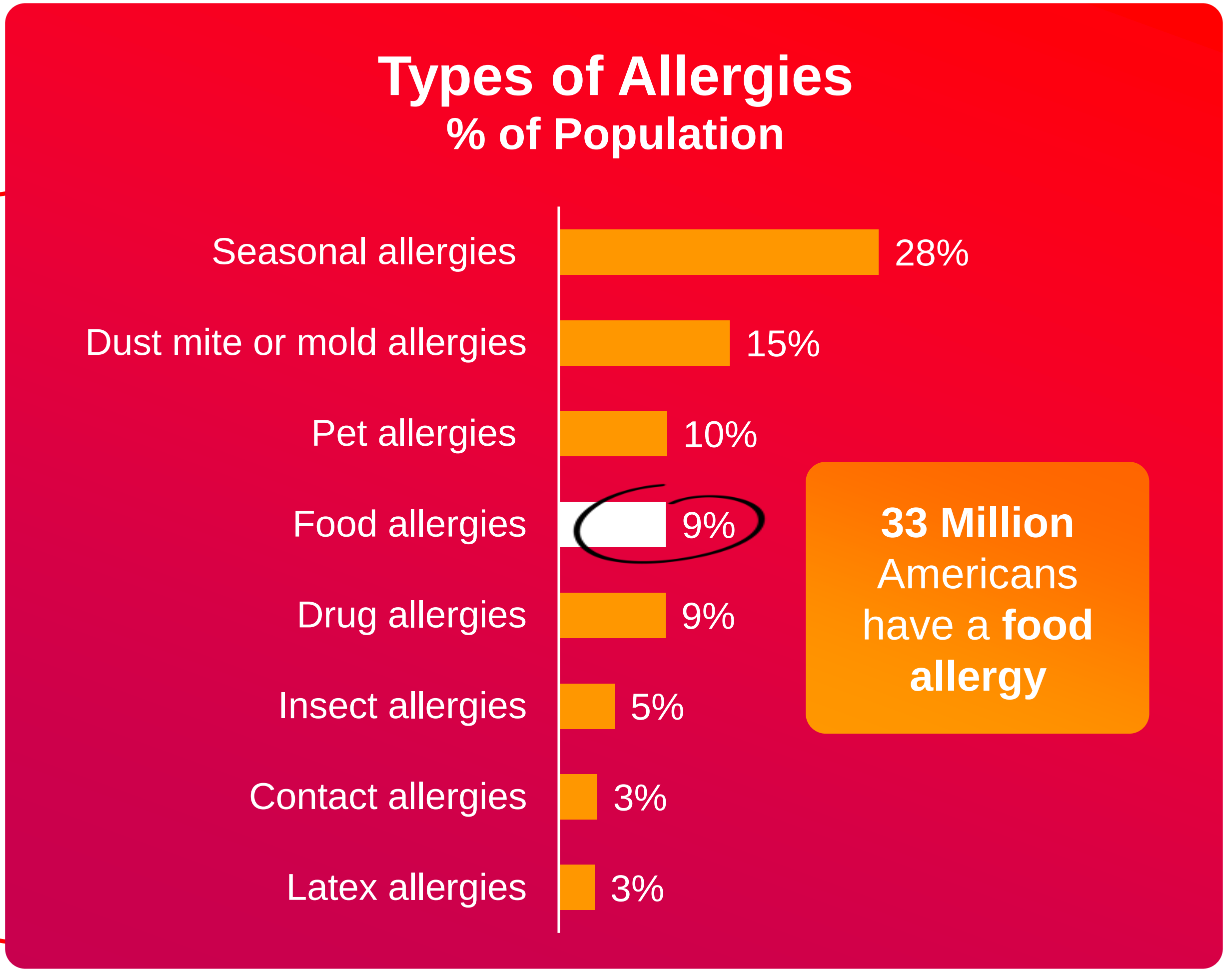
Conducted through Acosta Group's proprietary Shopper Community

March 28 to April 10, 2025

Sample = 598 U.S. adult shoppers in households with food or beverage allergies and/or intolerances

Food allergies and food sensitivities effect 1 in 10 U.S. households



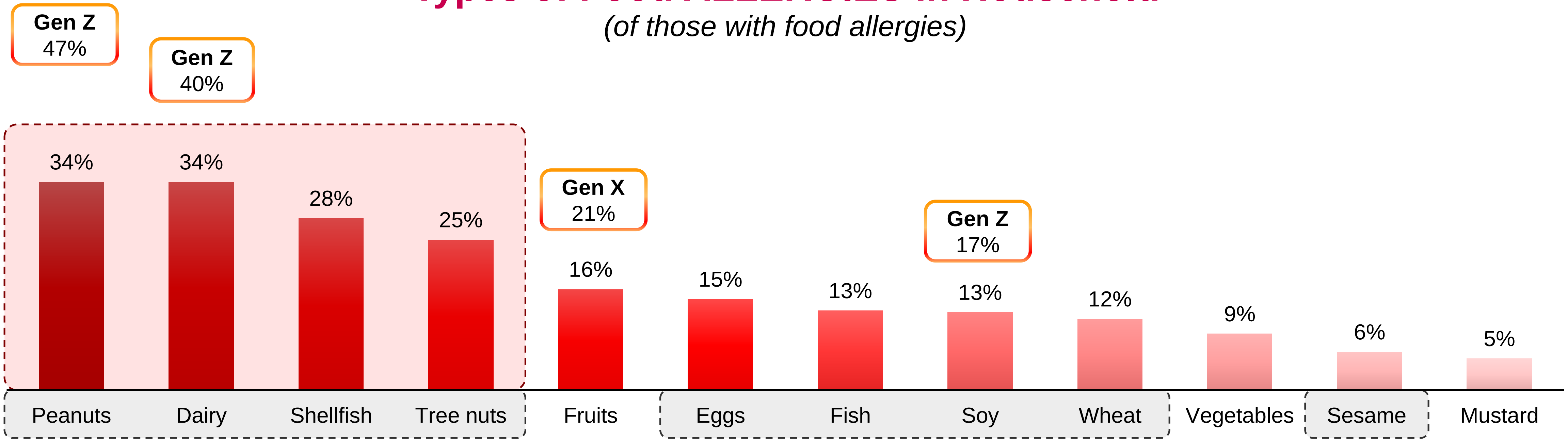


*Source: Acosta Group Shopper Community Survey April 2025, *Food Allergy*

1 in 3 households with food allergies has a dairy or peanut allergy, while 1 in 4 has a tree nut or shellfish allergy

Types of Food ALLERGIES in Household

(of those with food allergies)



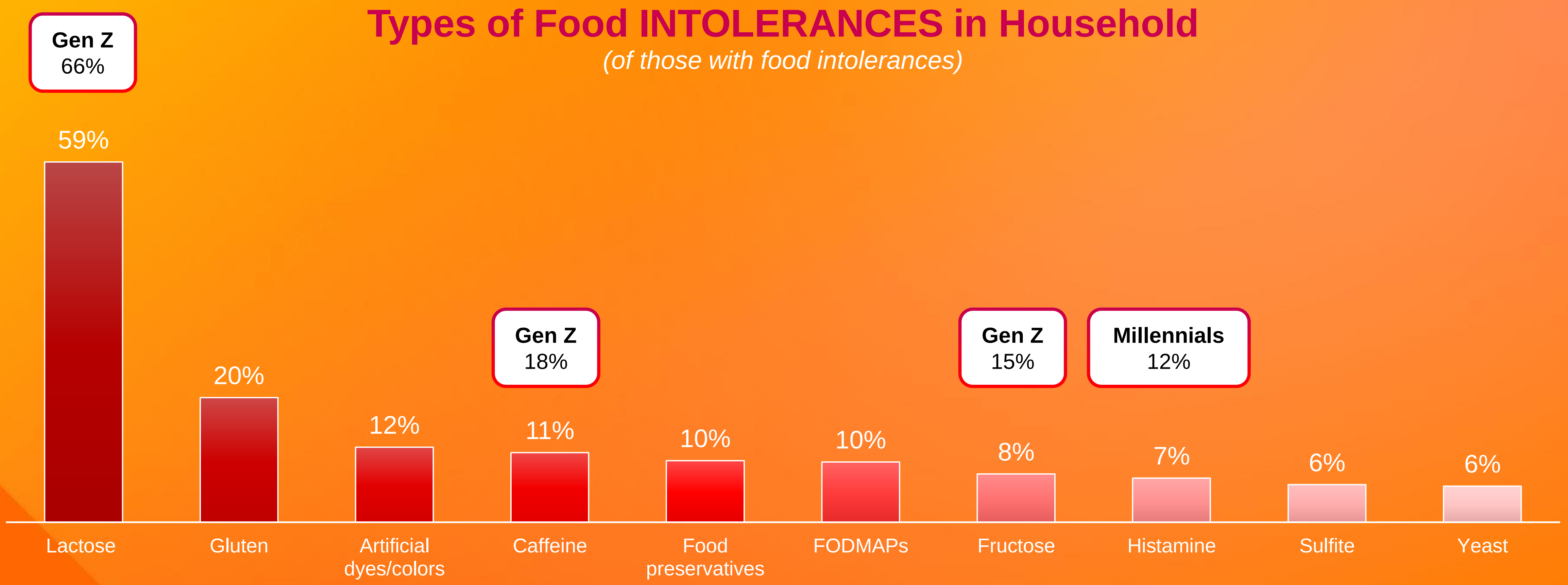
The Big 9:
Milk, eggs, fish, shellfish, tree nuts, peanuts, wheat, soy and sesame are responsible for **most** food allergies

Source: Acosta Group Shopper Community Survey April 2025

acosta group

BRIDGE2FOOD NORTH AMERICA

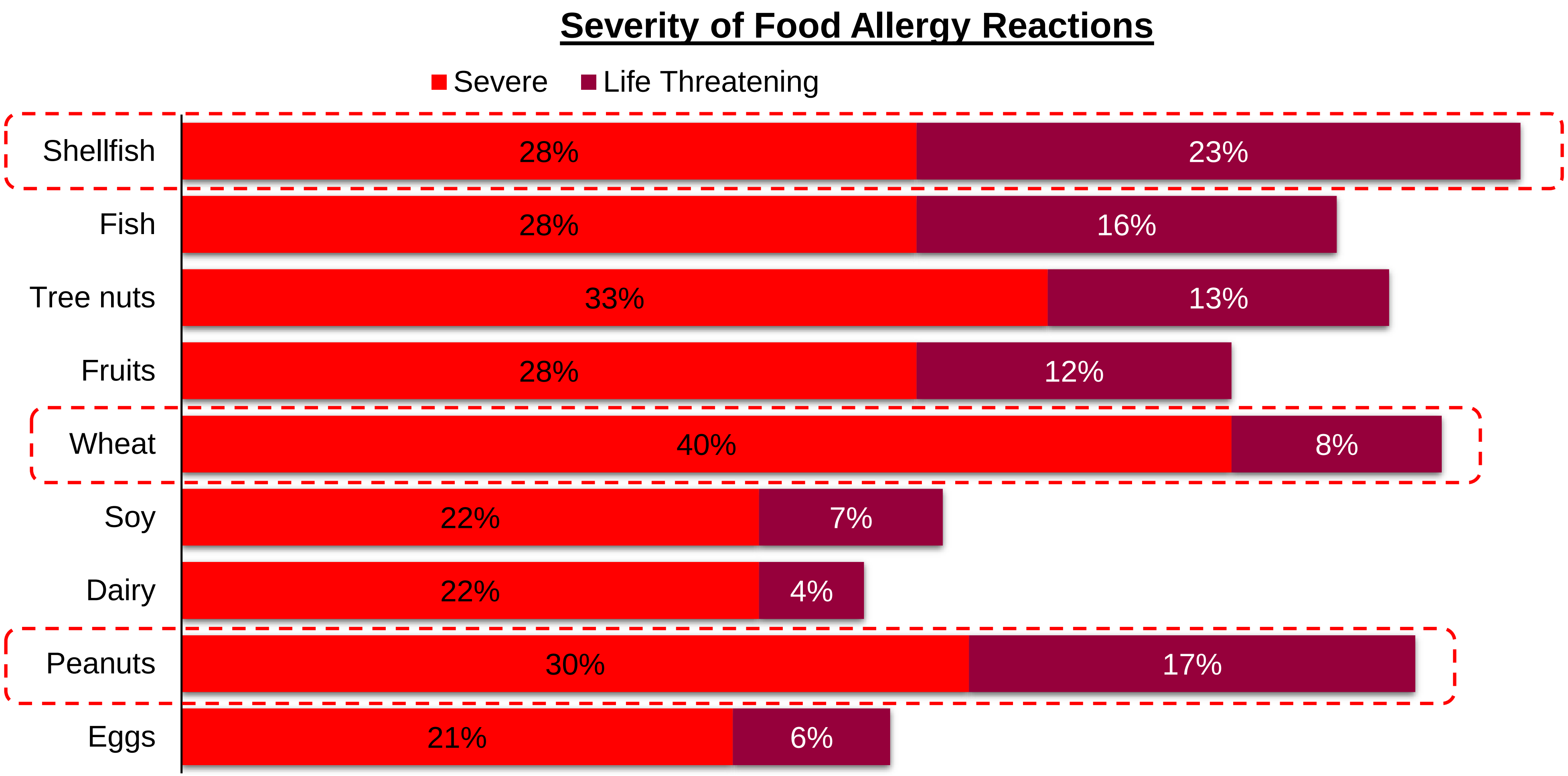
Lactose intolerance is by far the #1 food sensitivity



Source: Acosta Group Shopper Community Survey April 2025

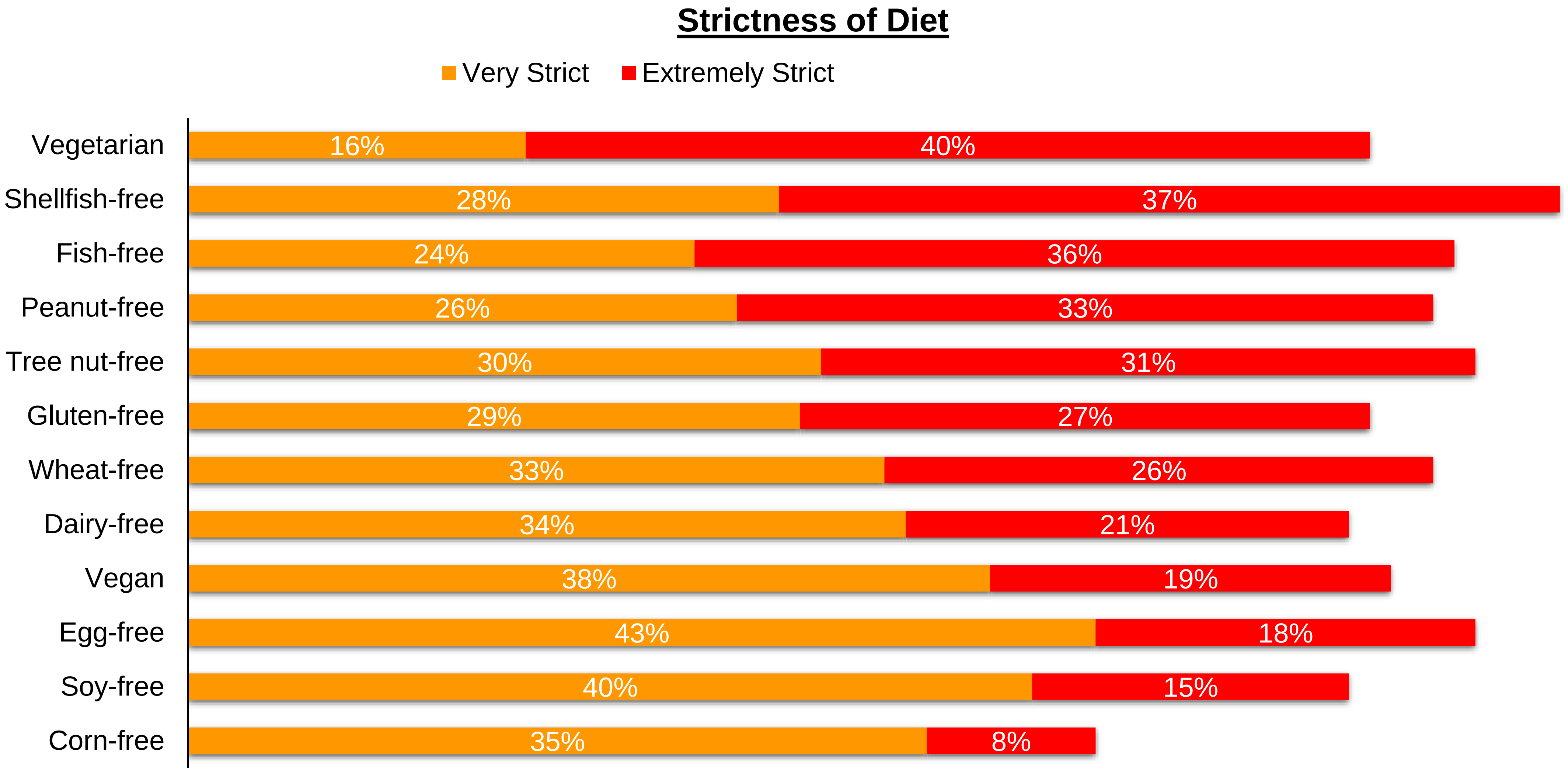
FODMAPs is short for Fermentable Oligosaccharides, Disaccharides, Monosaccharides, and Polyols. These short-chain carbohydrates can cause digestive issues.

Shellfish, wheat, and peanut allergic reactions can be most life-threatening



Source: Acosta Group Shopper Community Survey April 2025

The most extreme strict dieters are those on a vegetarian, shellfish-free, or fish-free diet.



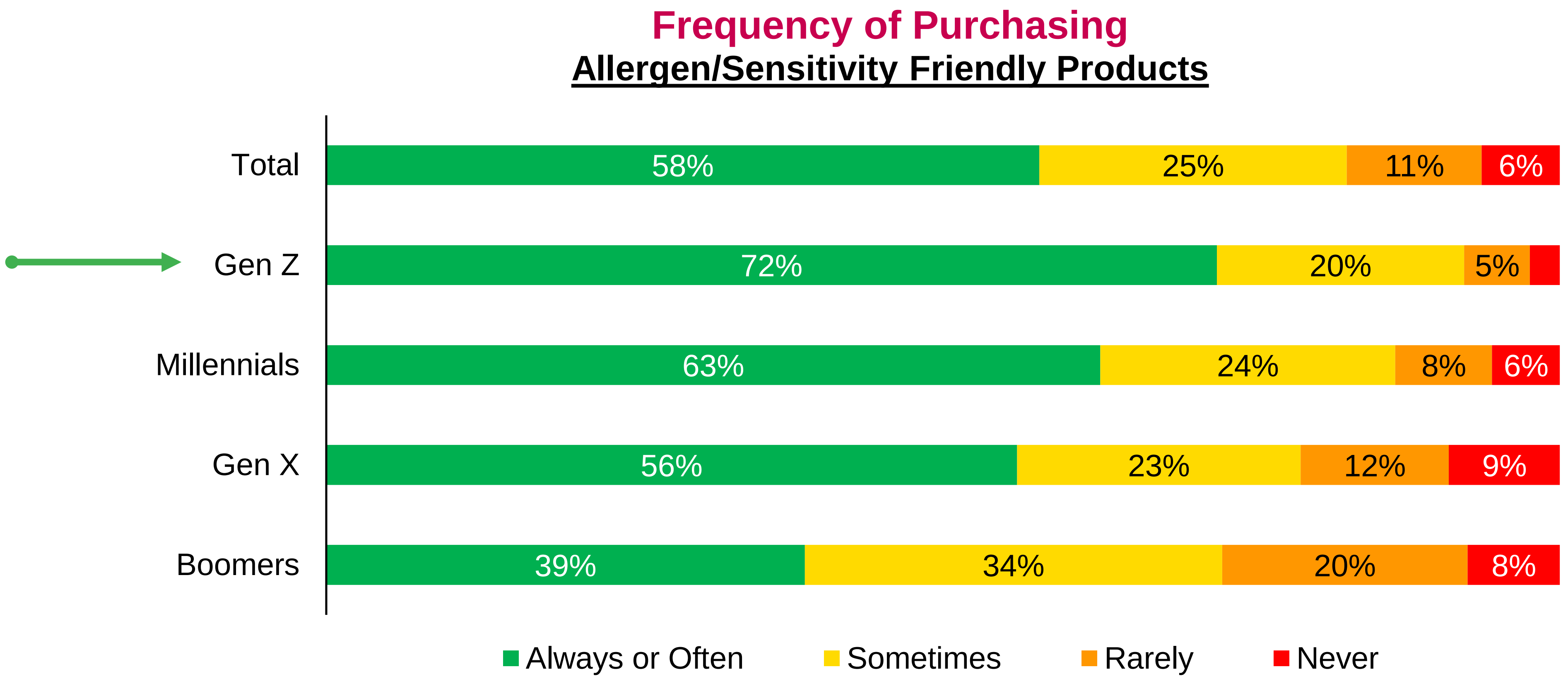
acosta group

Source: Acosta Group Shopper Community Survey April 2025

N=389 on a type of diet

BRIDGE2FOOD NORTH AMERICA

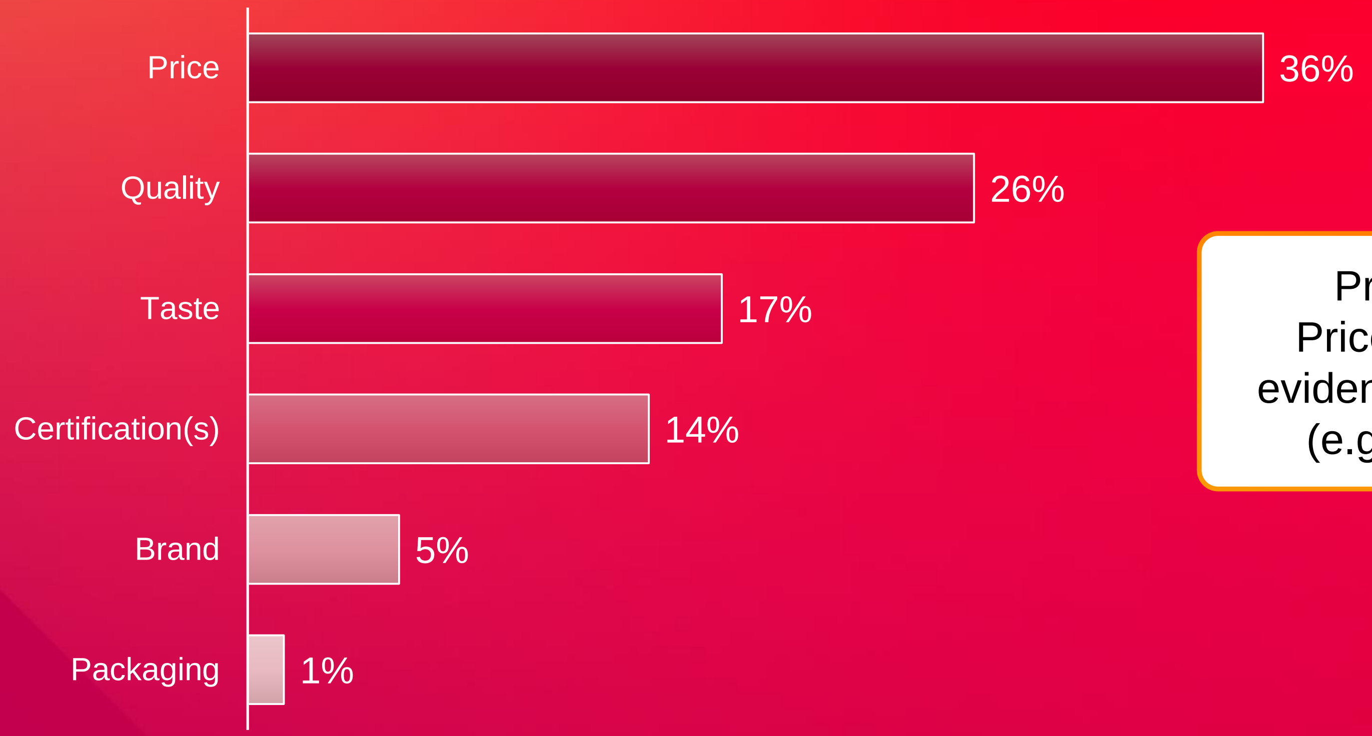
Over half of affected household frequently buy allergen or sensitivity-friendly products on their regular shopping trips



Source: Acosta Group Shopper Community Survey April 2025

Price and quality are most important when choosing foods for their diet – both signal value

Top Factor in Selecting Allergen/Intolerance-Friendly Foods

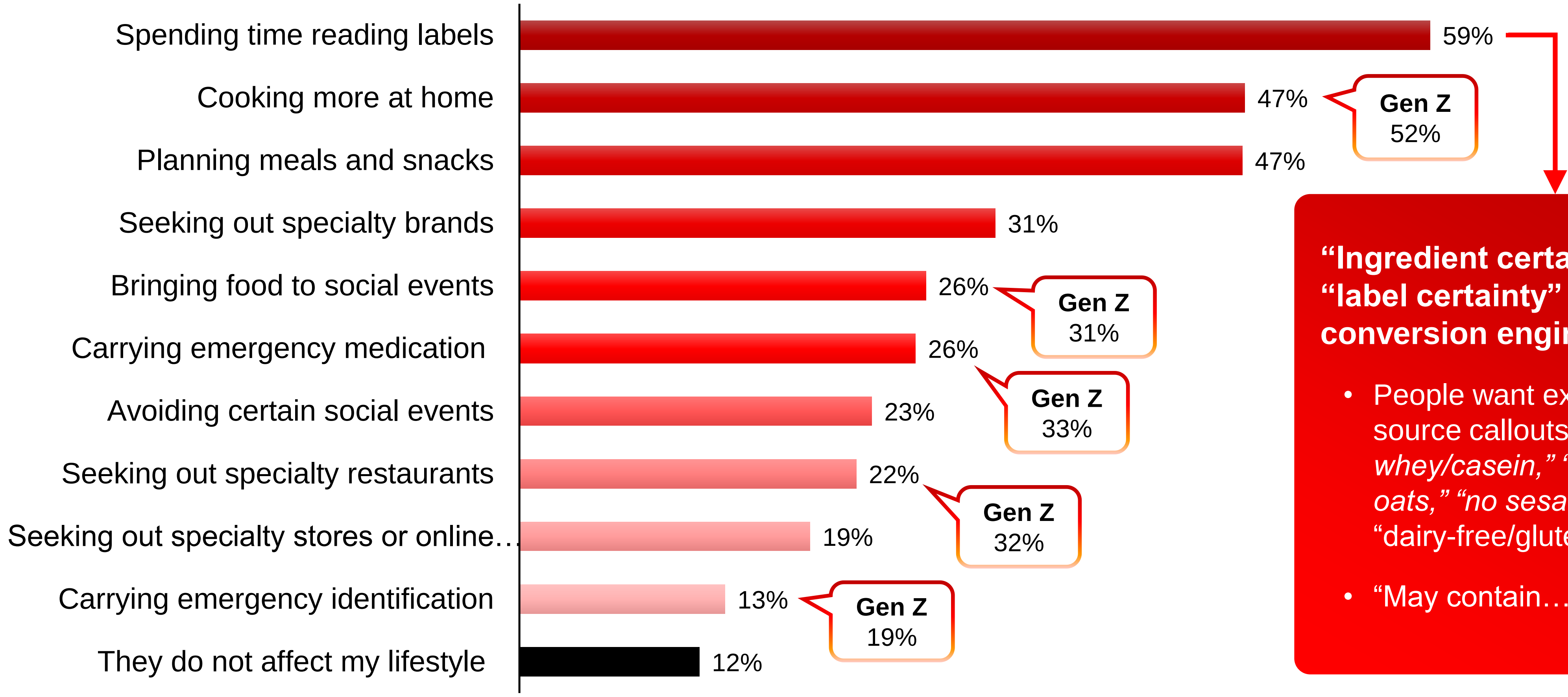


Price premiums are often not justified. Price/value is signaled when there is clear evidence and trust in safety and quality claims (e.g., dedicated facility, certified GF oats)

Sources: Acosta Group Shopper Community Survey April 2025, BioBrain analysis of UGC (user generated content)

Spending time reading labels is the biggest effect on lifestyles

Lifestyle Effect for Food Allergy and Intolerance



"Ingredient certainty" + "label certainty" is the conversion engine.

- People want explicit protein-source callouts *(e.g., "no whey/casein," "certified GF oats," "no sesame"),* not just "dairy-free/gluten-free" badges.
- "May contain…" is deal breaker

Sources: Acosta Group Shopper Community Survey April 2025, BioBrain analysis of UGC (user generated content)

Unexpected food reactions stem from hidden ingredients and cross-contamination

"**Cross-contamination in products** like baked goods, cereal, and oatmeal are the biggest culprits for my husband's peanut allergy." – **Millennial**, *Peanut Allergy, Shellfish Allergy*

"Have to really **watch out for sulfites** because my experience has been that they are **not always included in the label**."– **Boomer**, *Egg Allergy, Dairy Allergy, Wheat Allergy, Lactose Intolerance, Sulfite Intolerance, Artificial Color Intolerance, Food Preservative Intolerance*

"I had miso soup at a Japanese restaurant, not realizing **miso is made from fermented soybeans**." – **Millennial**, *Soy Allergy*

"Some **potato products use sulfites** as a preservative."– **Boomer**, *Sulfite Intolerance*

"Lip gloss, toothpaste, toilet paper... gluten. **Lots of products you wouldn't think have gluten** in them do." – **Millennial**, *Dairy Allergy, Wheat Allergy, Lactose Intolerance, Gluten Intolerance, FODMAPs Intolerance*

"A lot of **items secretly have caffeine,** and I've had issues where I've had anxiety and instant migraine without realizing I've had caffeine" – **Gen Z**, *Lactose Intolerance, Caffeine Intolerance*

"I found **shrimp extract in one of my favorite soups.** I started having mild reactions but couldn't figure out why until I went online and got the ingredients from the company's website." – **Gen X**, *Shellfish Allergy*

"**Artificial sugars**, I don't understand why they're in vitamins. There's no need for artificial sugar to be in a pill." **– Gen X**, *Lactose Intolerance*

Manufacturers have an opportunity to meet consumer demand for allergen free products

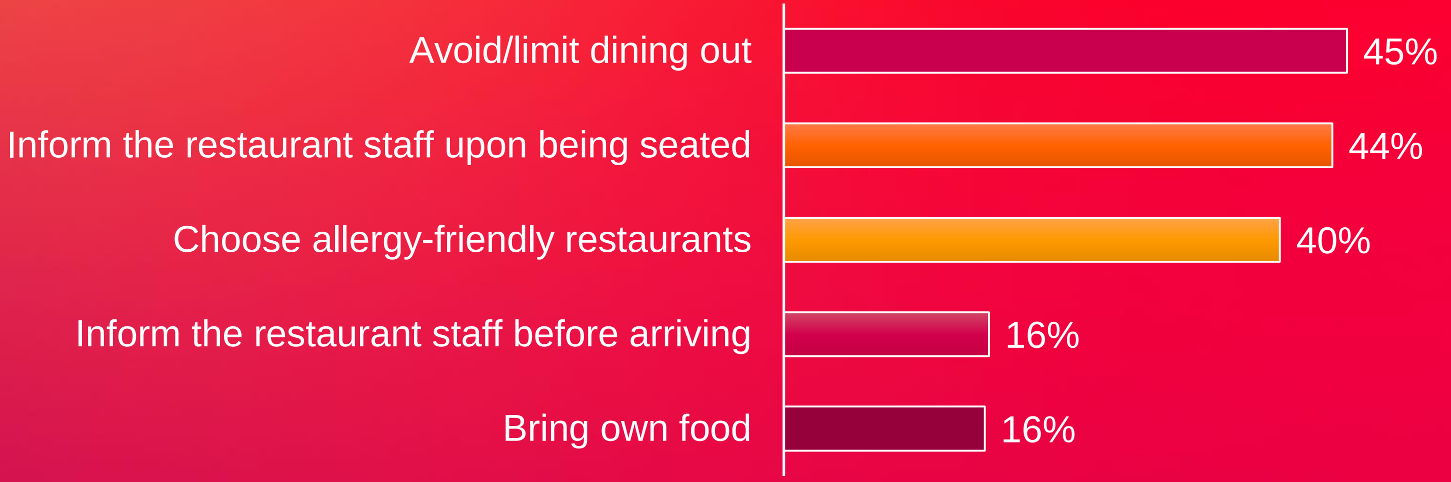
- Few items state allergen free, while those that qualify as allergen free over-index in both sales and units

Latest 52 weeks	% of All UPCs Selling	% $ Sales	% Unit Sales	Index
Free from Allergen STD	0.1%	0.1%	0.1%	100
Free from Allergen QLFD	9.2%	17.1%	17.1%	**186**

Dataset: NielsenIQ Retail Measurement | US Acosta (Synd) | Entire Dataset | Latest 52 Wks 9/20/25 | NPI FALCPA COMMON ALLRGNS QLFD & STTD – Free from: Milk, Fish, Soy, Shellfish, Peanuts, Tree Nuts, Wheat and Egg
Total Store is Alcohol, Baby Care, Bakery, Dairy, Deli, Frozen, Grocery, Health & Beauty Care, Household Care, Mear, Pet Care, Produce, and Seafood

When dining out, almost half of sufferers will alert restaurant staff of dietary needs as they are seated, with just as many avoiding dining out altogether

Preventative Measures Taken Dining Out



Cross-contact is the most cited fear showing up around fryers, prep areas, and shared lines.

> Eating out can be challenging. It **requires being very clear when ordering,** which sometimes feels like a hassle.
>
> – **Gen Z**, *Soy Allergy*

Sources: Acosta Group Shopper Community Survey April 2025, BioBrain analysis of UGC (user generated content)

BioBrain

acosta group

ALLERGEN-FREE PRODUCT INNOVATION

acosta group

Products best at highlighting food allergen claims place them in prominent package locations with unique type or color

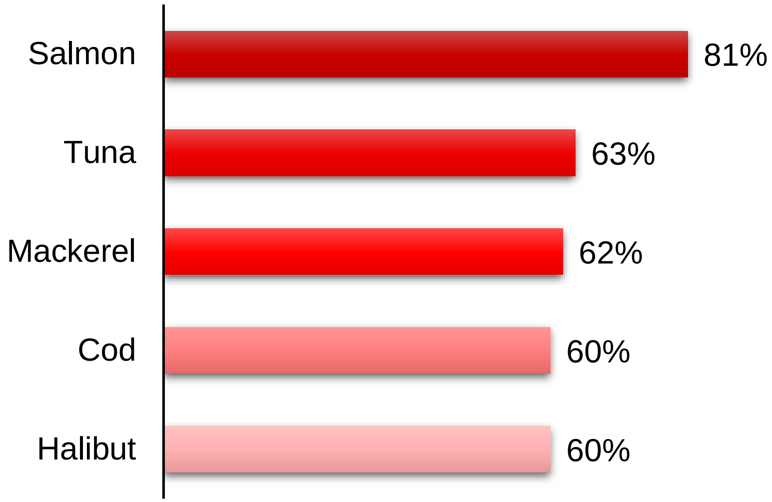
Source: Acosta Group Shopper Community Survey April 2025

acosta group

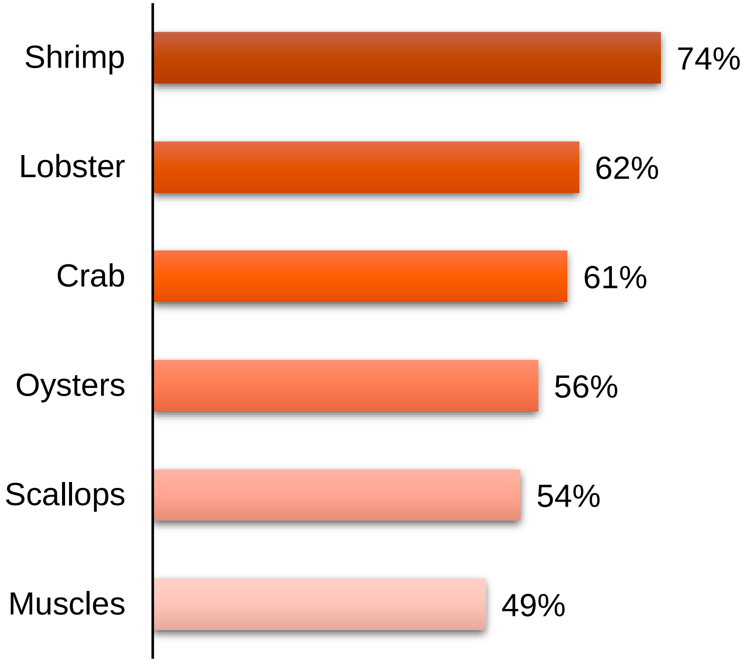
BRIDGE2FOOD NORTH AMERICA

Specific types of allergies can vary and impact innovation differently

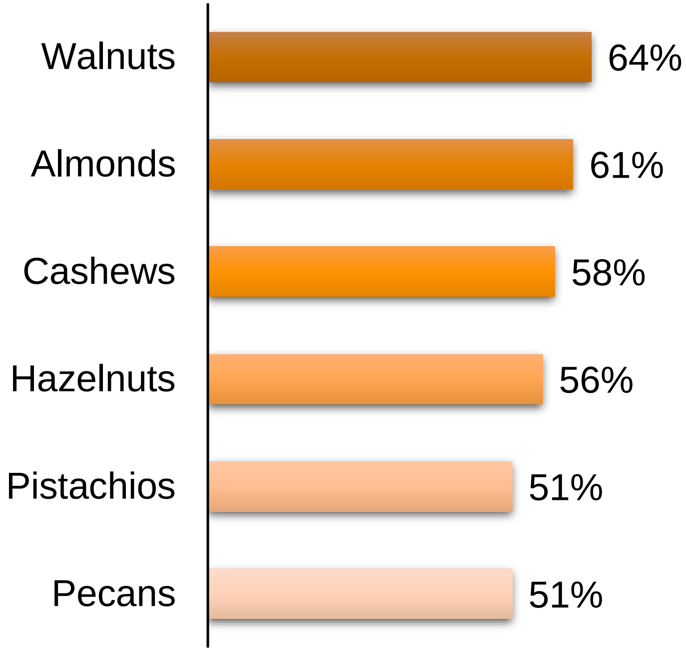
Fish Allergies



Shellfish Allergies



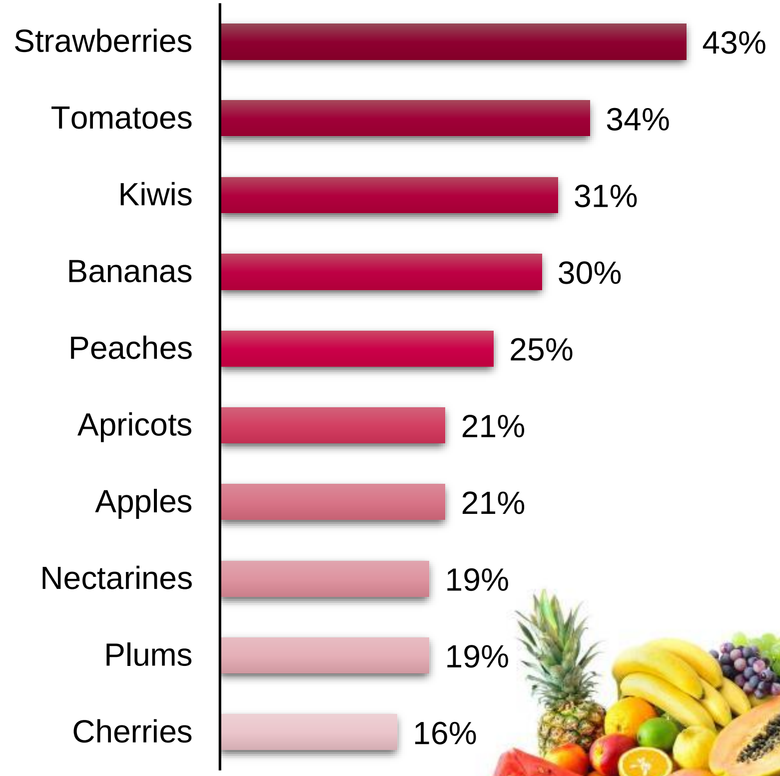
Tree Nut Allergies



Among those with said type of allergy

Innovation must keep in mind specific types of fruit and vegetable allergies

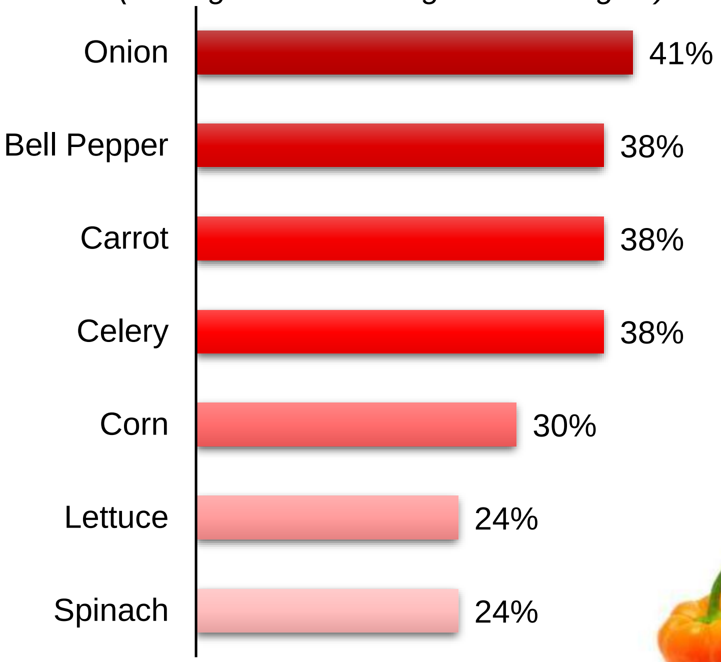
Fruit Allergies
(among those with fruit allergies)



<u>Other Fruit Allergies</u>

Avocado
Blueberries
Blackberries
Coconuts
Mango
Oranges
Pineapple
Pomegranate
Raspberries
Watermelon

Vegetable Allergies*
(among those with vegetable allergies)



<u>Other Vegetable Allergies</u>

Broccoli
Cabbage
Eggplant
Garlic
Green Beans
Peas

Source: Acosta Group Shopper Community Survey April 2025

**Low sample size*

Top consumer language around allergen-free foods

1. **“Ingredient certainty” + “label certainty” drive conversion to purchase.**
2. **Taste + texture wins are the strongest positive reinforcement.**
3. **Common friction points:**
   - **oat/coconut bases**
   - **may-contain/shared facility language.**

Source: BioBrain analysis of UGC (User Generated Content) across web

Top 20 Food Allergy Mentions by Consumers

Rank	Allergen	Context (top co-mentions)	Insight
1	Gluten	Bread/pasta, baked goods, pizza	Labeling & cross-contact dominate; clear certified GF cues drive trust.
2	Milk/Dairy	Alt-milks, coffee/latte, ice cream & yogurt	Hidden whey/casein in powders and "contains milk" notes are key friction.
3	Oat	Oat milk, baked goods, granola	"GF oats ≠ safe for all" is a recurring pain point; demand for sourcing clarity.
4	Coconut	Desserts/chocolate, alt-milks, frozen treats	Popular plant base but not universally tolerated; needs explicit callouts.
5	Chocolate/Cocoa	Bars/chips, baking, ice cream	"May contain milk" & heat/melt issues shape risk perception and purchase.
6	Tree nuts (specific)	Nut milks, chocolate, baked snacks	"Nut-free / school-safe" claims strongly influence acceptance.
7	Egg	Baking/cakes, mixes, mayo	Constant swap requests; success varies by format and recipe.
8	Soy	Soy milk/tofu, protein powders, sauces	Taste/afterfeel is polarizing; soy-free labels help shortcut decisions.
9	Legumes (pea/chickpea/lentil)	Protein powders/bars, alt-dairy, snacks	Pea protein skew positive; occasional notes on bloat/aftertaste.
10	Fish	Packaged fish, sauces, restaurants	Lower volume; pack formats draw more scrutiny than fresh.
11	Peanut	Candy/chocolate, spreads, school settings	Sunflower-based swaps praised; vigilance around treats remains high.
12	Garlic	Sauces/seasonings, dressings, prepared foods	FODMAP-like sensitivities; seasoning transparency valued.
13	Onion	Sauces/seasonings, dressings, prepared foods	Similar FODMAP concerns; "no onion/garlic" filters requested.
14	Wheat	Bread/pasta, baking	Overlaps with gluten; legacy labels can confuse shoppers.
15	Corn	Syrups/starches, snacks, tortillas	Hidden inputs (e.g., corn syrup/starch) trigger label deep-dives.
16	Shellfish	Seafood dishes, fryers, restaurants	Cross-contact in fryers and menus is the main anxiety driver.
17	Sesame	Buns, tahini, dressings	Post-regulation awareness rising; seed & oil distinctions matter.
18	Sunflower seed	Chocolate, seed butters, snacks	Confusion with sunflower lecithin; needs explicit ingredient lines.
19	Mustard	Condiments, sauces, dressings	Often hidden; front-of-pack callouts reduce guesswork.
20	Celery	Soups/stocks, seasonings	Lower awareness; appears via seasoning bases and broths.

What Consumers Think About Ingredients

Good Ingredients (Net Positive Sentiments)

- Pea / Legume — strong positive reception in powders, bars, alt-dairy; occasional bloat/aftertaste but outweighed by “cleaner protein” appeal.
- Cocoa / Chocolate — positive when allergen-safe; trust hinges on clear “no milk/may contain” lines and melt-safe shipping.
- Avocado — favorable in bowls/salads; feels “natural and safe.”
- Banana — positive in smoothies/baking as an egg/sugar reducer.
- Maple syrup & Honey — more favorable than refined sugar in home baking; moderation lens applies.

Bad Ingredients (Net Negative / Risk Signals)

- Wheat / Gluten — top driver of negative sentiment (cross-contact, legacy labels; demand for certified GF).
- Milk / Dairy (whey/casein) — hidden in powders, ice cream, coffee; “contains milk” flags erode trust.
- Soy — polarizing; taste/afterfeel complaints in milks & powders.
- Garlic & Onion — frequent FODMAP-type triggers, especially in sauces/seasonings.
- Sesame — rising watch-out post regulation; buns/tahini need explicit callouts.

Source: BioBrain analysis of UGC (User Generated Content) across web

Just Egg reformulation – December 2025

Just Egg Folded Updates

- Simpler ingredient statement
- Removal of garlic and onion
- Reduction in total fat and sodium
- Minimal change to carbohydrates and protein
- Product with changes shipping December 2025

Previous

Water, Mung Bean Protein, Expeller-Pressed Canola Oil, Corn Starch, Contains less than 2% of Baking Powder (sodium acid pyrophosphate, sodium bicarbonate, corn starch, monocalcium phosphate), Carrot Extractives (color), Dehydrated Garlic, Dehydrated Onion, Salt, Transglutaminase, Turmeric Extractives (color).

Nutrition Facts

4 servings per container	
Serving size	**1 Piece (57g)**
Amount per serving	
Calories	**80**
	% Daily Value*
Total Fat 6g	**8%**
Saturated Fat 0g	**0%**
Trans Fat 0g	
Polyunsaturated Fat 1.5g	
Monounsaturated Fat 3.5g	
Cholesterol 0mg	**0%**
Sodium 300mg	**13%**
Total Carbohydrate 3g	**1%**
Dietary Fiber 0g	**0%**
Total Sugars 0g	
Includes 0g Added Sugars	**0%**
Protein 6g	**6%**
Vitamin D 0mcg	0%
Calcium 10mg	0%
Iron 0.7mg	4%
Potassium 40mg	0%

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

New

Water, Mung Bean Protein, Expeller-Pressed Canola Oil, Corn Starch, Contains less than 2% of Potassium Citrate, Salt, Cream of Tartar (Potassium Bitartrate), Baking Soda (Sodium Bicarbonate), Transglutaminase (Enzyme).

Nutrition Facts

4 servings per container	
Serving size	**1 Piece (57g)**
Amount per serving	
Calories	**80**
	% Daily Value*
Total Fat 5g	**6%**
Saturated Fat 0g	**0%**
Trans Fat 0g	
Cholesterol 0mg	**0%**
Sodium 230mg	**10%**
Total Carbohydrate 2g	**1%**
Dietary Fiber 0g	**0%**
Total Sugars 0g	
Includes 0g Added Sugars	**0%**
Protein 5g	**6%**
Vitamin D 0mcg	0%
Calcium 0mg	0%
Iron 0.6mg	4%
Potassium 70mg	2%

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

U.S. GLP-1 Usage for Weight Loss

Innovation Insights

acosta group

GLP-1 Weight Loss Usage Shopper Survey

Objectives:

To help better understand …

- GLP-1 users' experiences with the drugs and impact on eating and shopping habits
- Lapsed GLP-1 users' post-impact on eating and buying behavior
- Changing nutritional needs overall – particularly for high protein – and interest in specific products targeted for GLP-1 users (including symptom relief)

Shopper research conducted through Acosta Group's proprietary Shopper Community

Quantitative Online Survey
February 10 - 19, 2025
N= 4,489 Total U.S. Adults
N = 332 Current GLP-1 Users
N =151 Lapsed GLP-1 Users

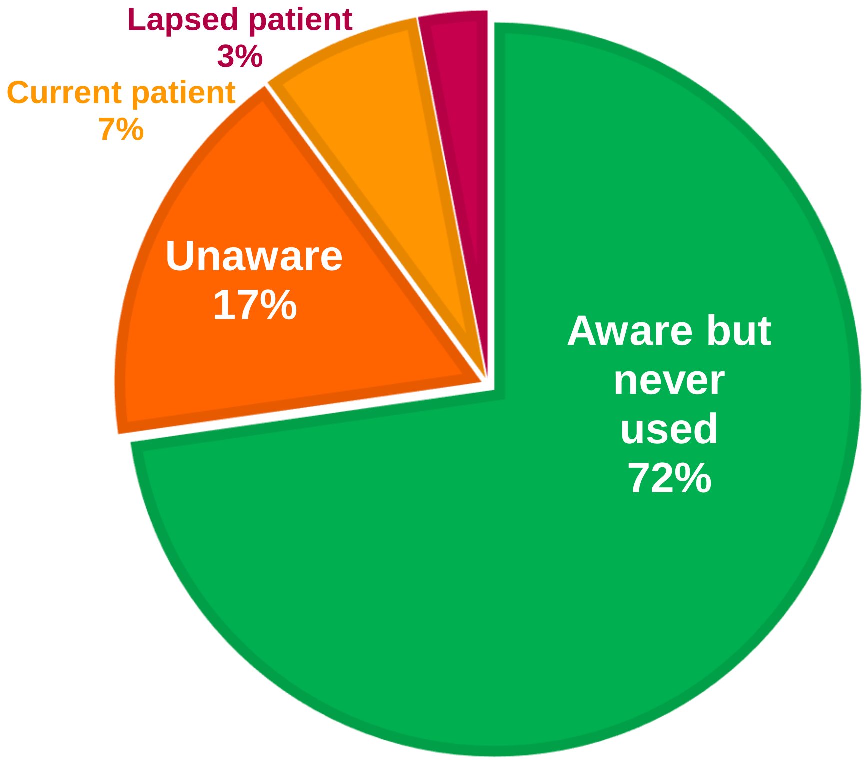
Qualitative Online Chat
March 3 - 7, 2025
N = 7 Current GLP-1 Users
N =8 Lapsed GLP-1 Users

acosta group | Shopper Insights

Media coverage has driven awareness of GLP-1 drugs for weight loss

GLP-1 Awareness & Usage

% U.S . Adults

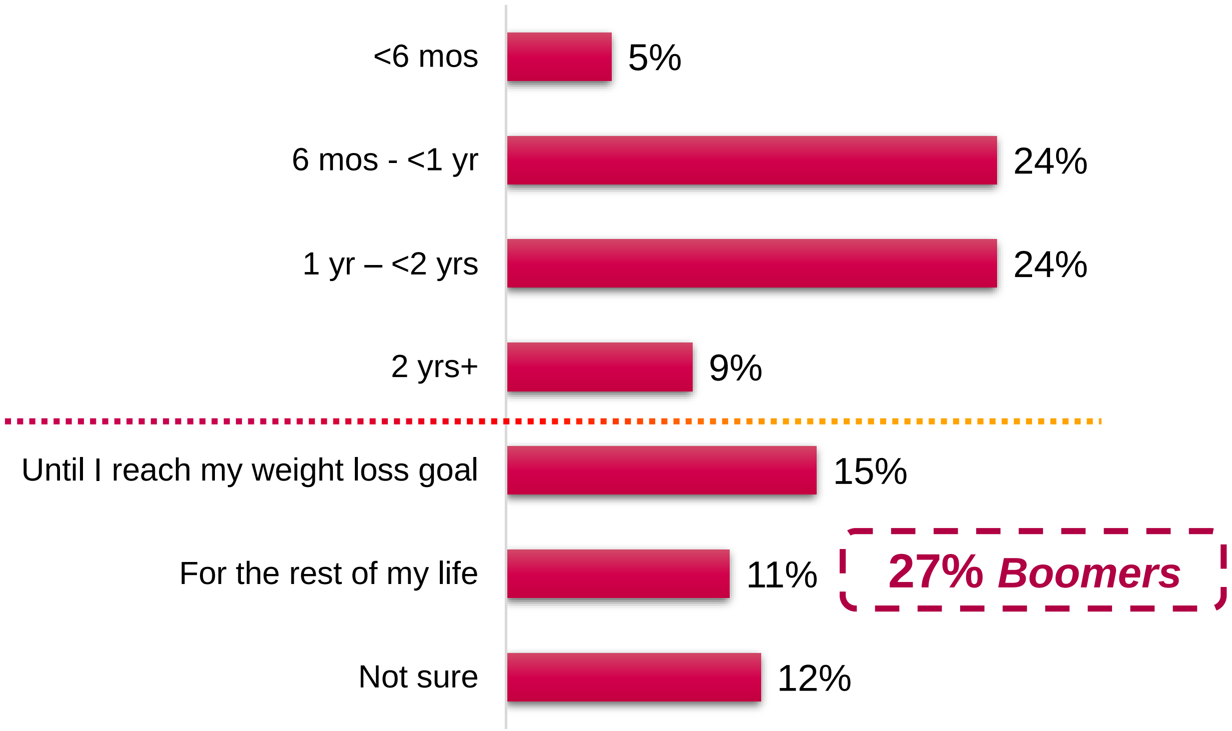


acosta group

While studies show long-term GLP-1 use is needed to maintain weight loss, over half of current users expect to continue for less than 2 more years

69% of current GLP-1 users have been on the drug for < 2 years

How Long Users Expect to Continue a GLP-1 for Weight Management

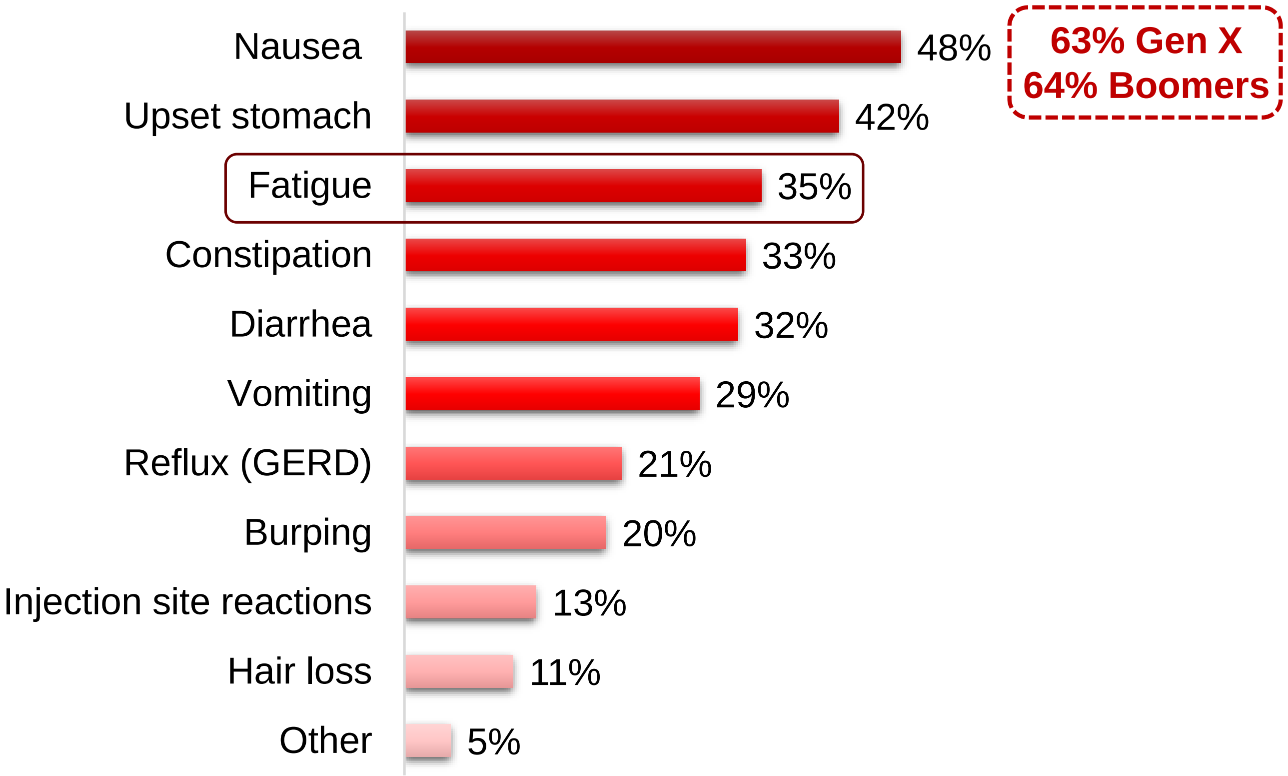


acosta group

Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

The #1 concern among GLP-1 users is their side effects; Gastrointestinal issues are most common, with Fatigue also a top concern

37% of GLP-1 Users Have Side Effects



acosta group

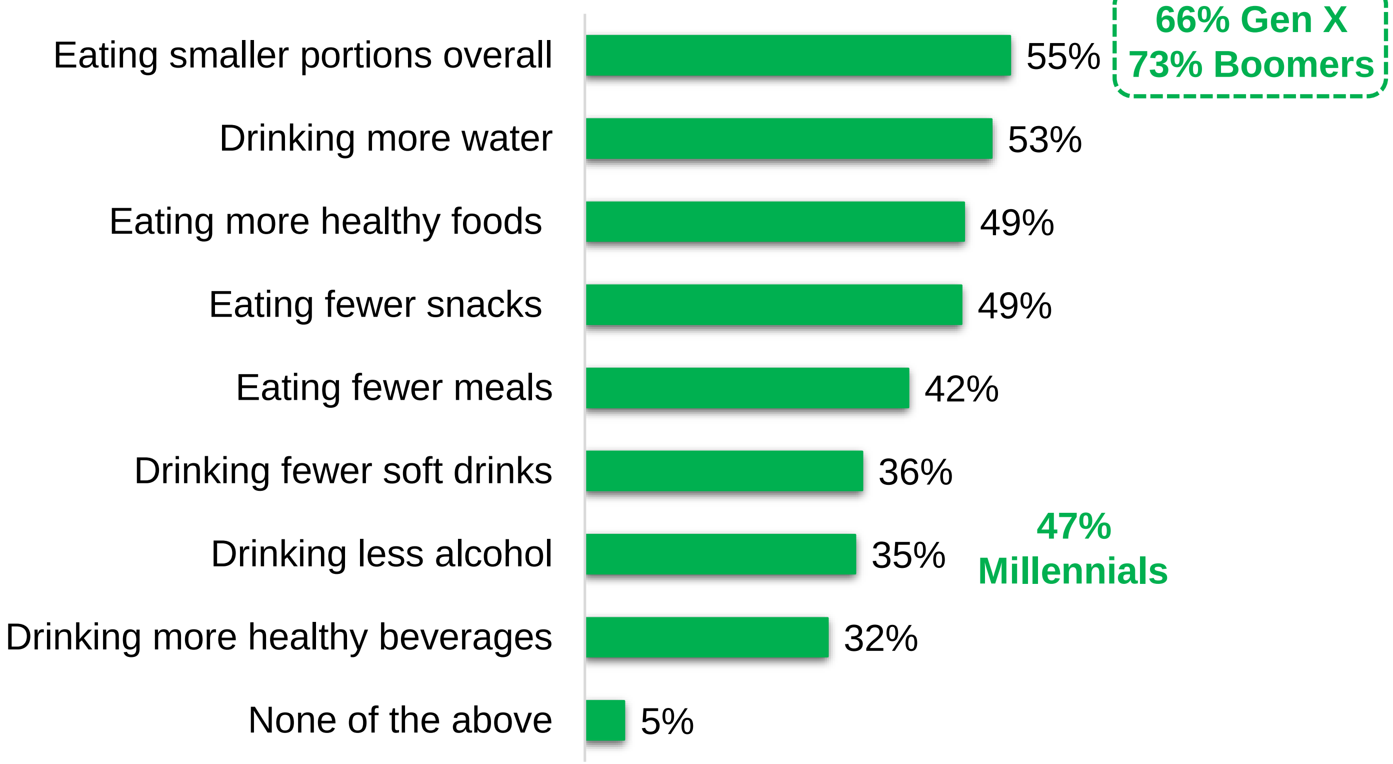
% of Current GLP-1 Users Experiencing Moderate – Very Severe Side Effects

Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

95% of GLP-1 users have made positive changes to their dietary habits since being on the medication

Impact of GLP-1 on Eating Habits

% of Current GLP-1 Users

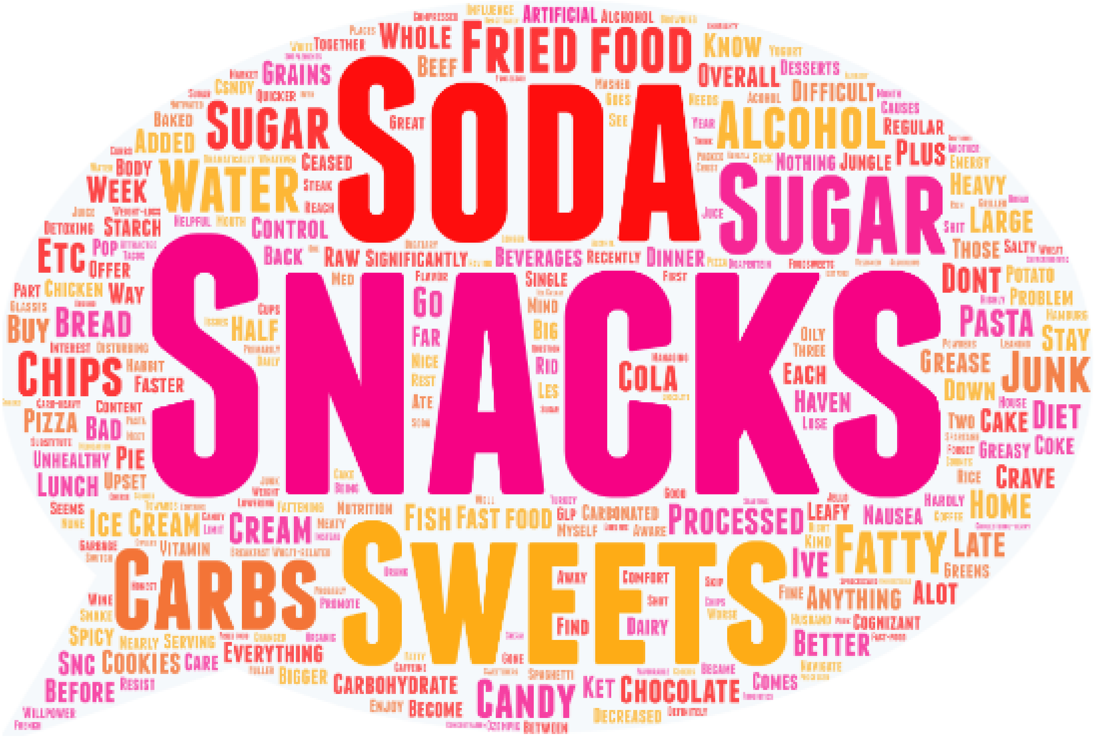


acosta group

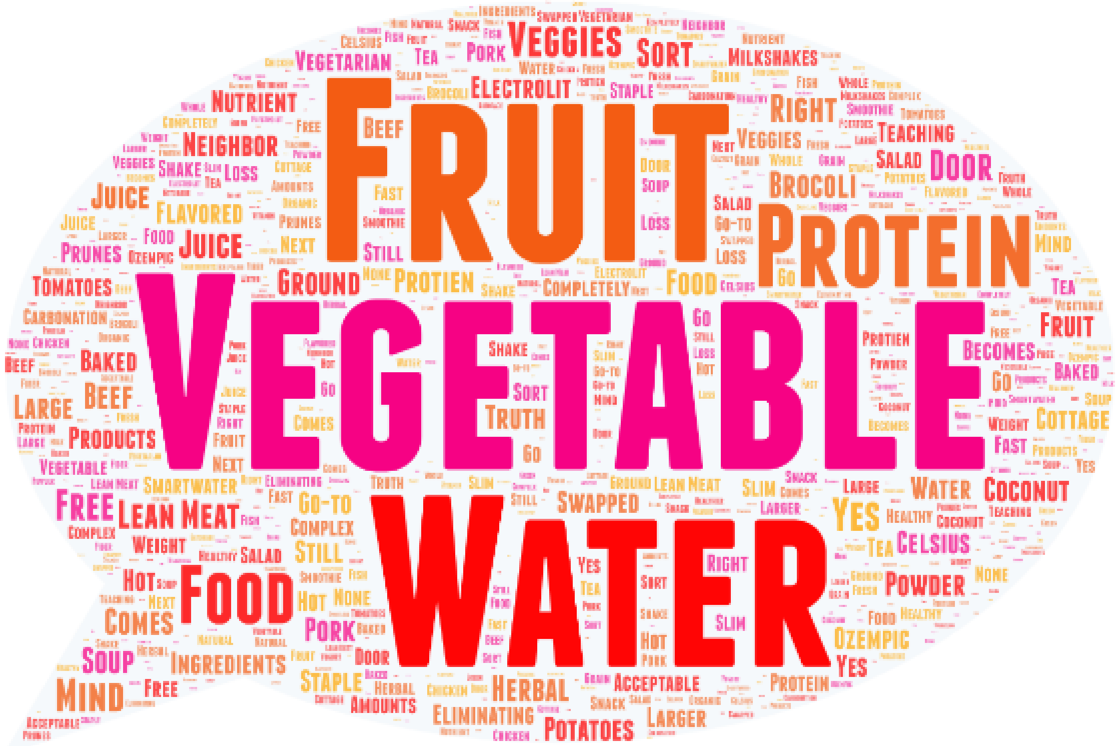
Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

More specifically, GLP-1 users are shifting from unhealthy or processed food and beverages to healthier foods and better hydration

Consuming less …



Consuming more …



> ***"Since using GLP-1 drugs, I've lost a lot of interest in foods which are either processed or high in sugar and fats."*** – Millennial

acosta group

Among GLP-1 users who noted eating changes

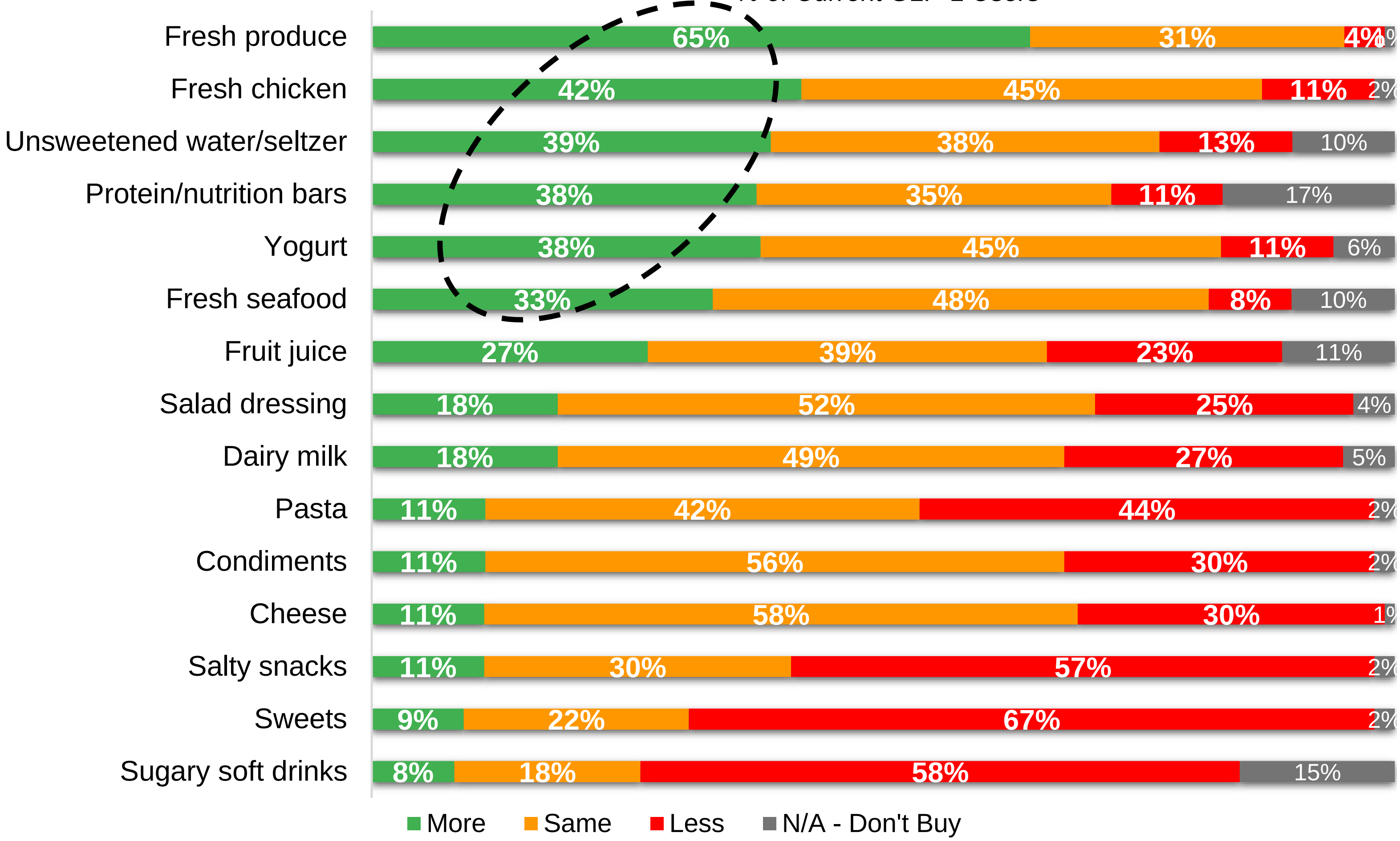
Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025, Acosta Group GLP-1 Qualitative Study - March 2025

Changing Nutrition Needs

A healthier consumption shift aligns with nearly 60% of GLP-1 users that have made significant changes to what they buy since being on the drug

Changes in Category Buying – More vs. Less

% of Current GLP-1 Users

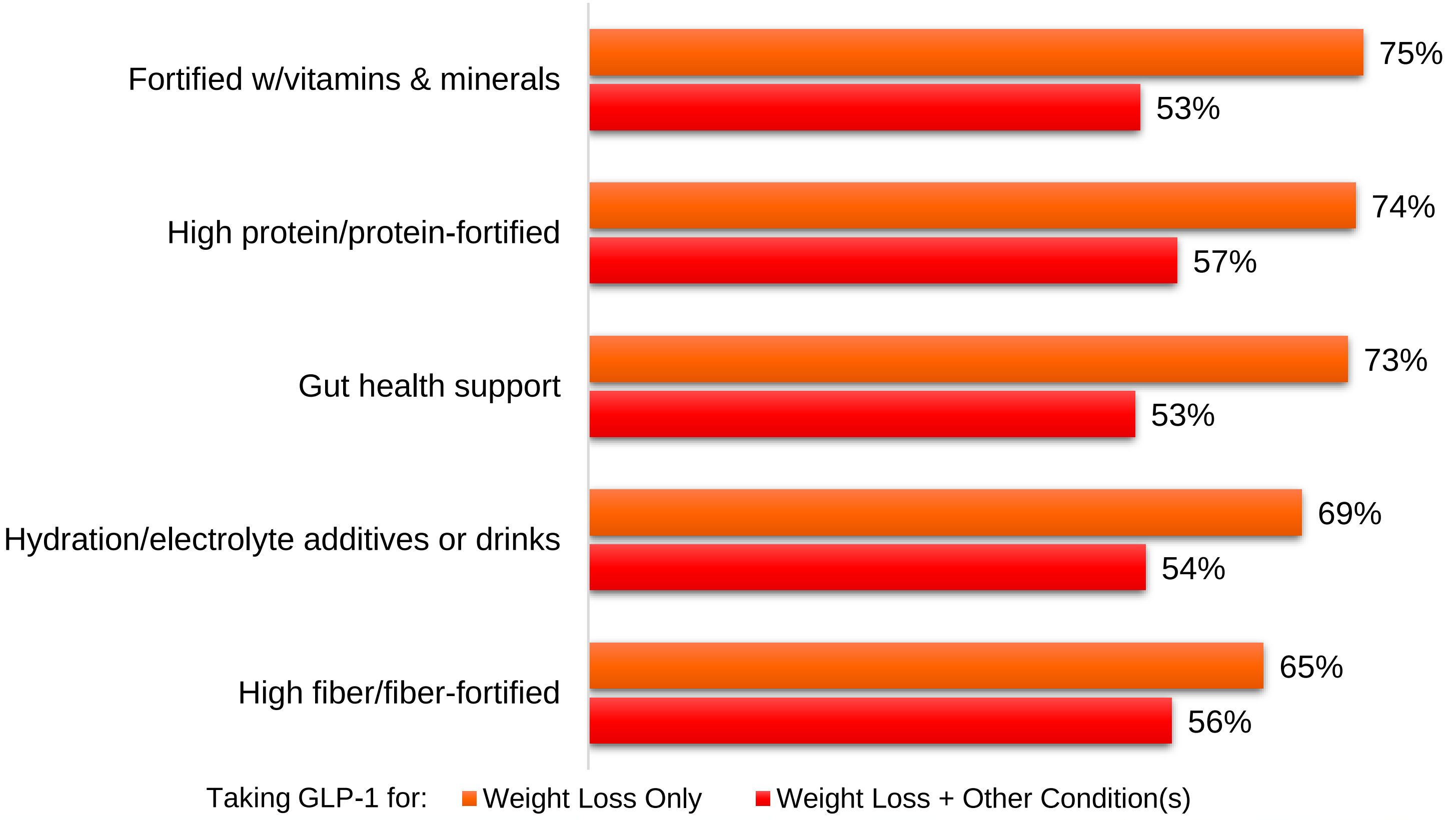


acosta group

Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

Taking a GLP-1 has made weight loss-only users more interested in products with key nutrients to support their weight loss vs. other GLP-1 users

Interest in Specific Nutrients due to GLP-1 Use by User Type*



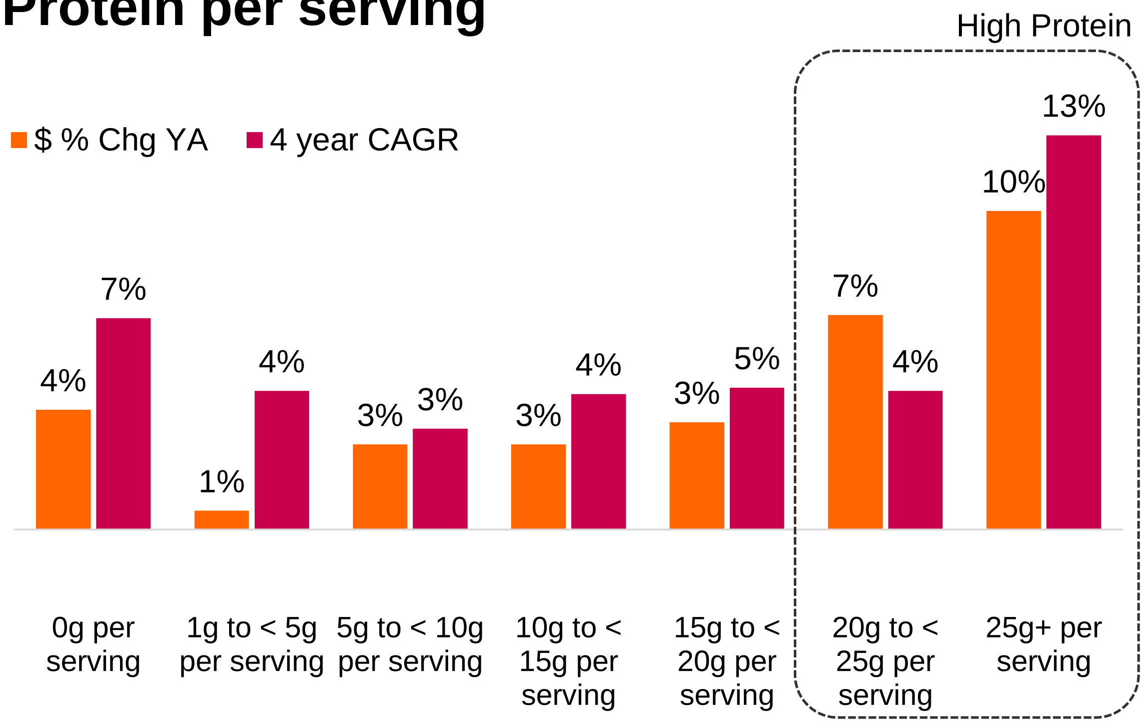
*Top 2 Box = More interested/A lot more interested

Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

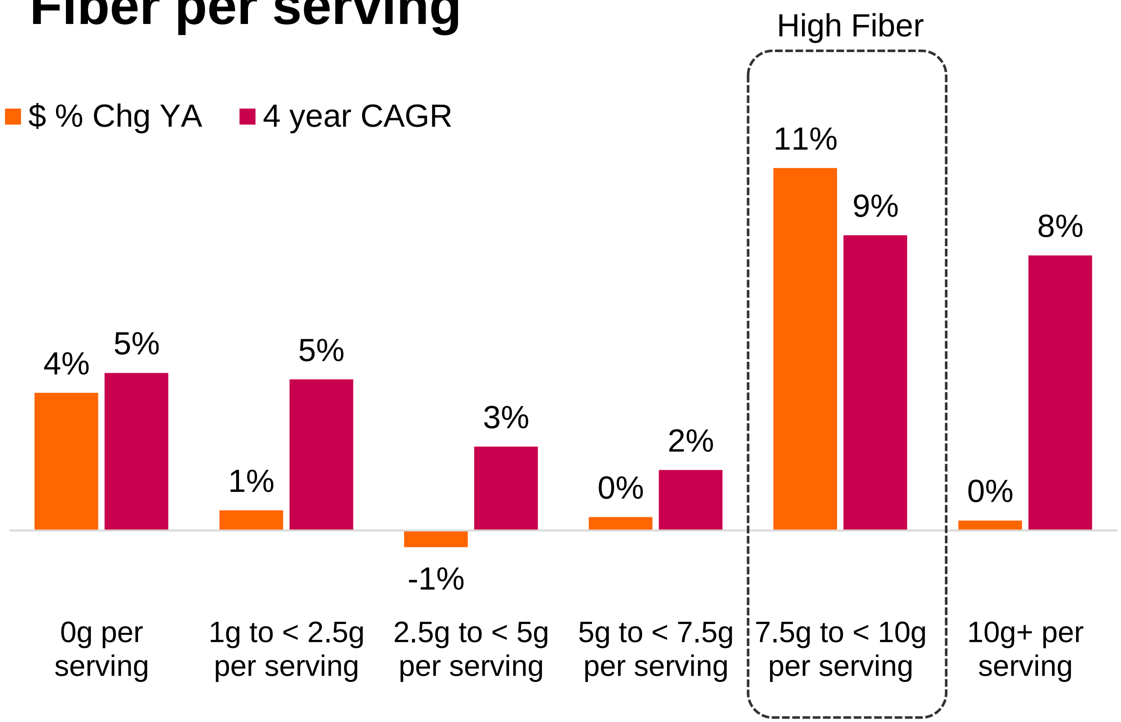
acosta group

How much protein and fiber are consumers interest in?

Protein per serving



Fiber per serving



29% 36% 19% 7% 5% 3% 2% 42% 46% 9% 3% 1% <1%

$ Share of Total Foods & Beverage

acosta group

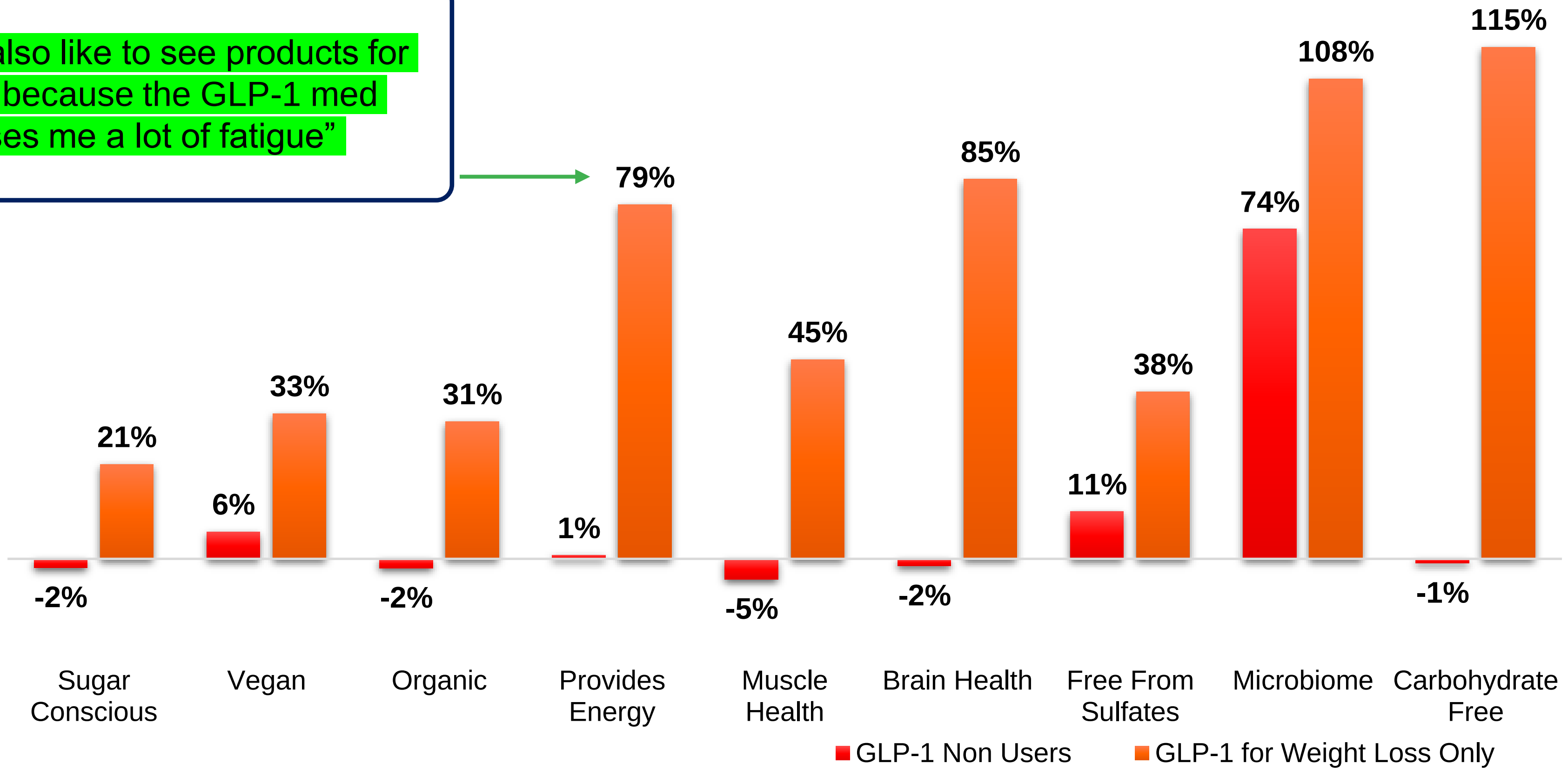
Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Food & Beverage; $ Share of Food & Beverage, $ % change vs year ago, 4yr CAGR; 52 weeks ending January 25, 2025

NIQ data among GLP-1 weight loss shoppers shows stronger growth for key health need states

Nielsen Unit Growth of Items in Key Health Needs States

GLP-1 for Weight Loss Only Users vs. GLP-1 Non-Users

"I would also like to see products for energy because the GLP-1 med causes me a lot of fatigue"



acosta group

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sept 2024): Total US Outlets, Total Food & Beverage Product Insight stated claims on package. Unit % Change, 52 w/e 9/28/24

Consumer Needs & Innovation Trends

Consumer Need Area	Stated preferences
High-Protein Nutrition	Satisfying hunger, preserving muscle mass during reduced calorie intake
Digestive Health & Fiber	Better digestion, gut health, constipation relief
Appetite Control & Portion Size	Smaller meals, portion-controlled snacks, lower appetite
Hydration & Electrolytes	Increased water needs, reduced thirst cues, need for replenishment
Taste & Texture Satisfaction	Avoid metallic, bitter, overly dense or dry foods
Clear Labeling & Trust	Avoid vague 'GLP-1 friendly' claims; seek clarity on protein, fiber, sugar
Affordability & Access	Price concerns due to high cost of medication; prefer multi-use or bundled packs
Convenience & Mobility	Need for grab-and-go, compact, easy-open formats
Emotional Wellbeing & Indulgence	Still want treats or comfort foods in small doses

Source: BioBrain analysis of UGC (User Generated Content) across web

Summary

acosta group | Shopper Insights

Nearly all GLP-1 users make positive dietary changes that contribute significantly to what they buy

- GLP-1 users are more interested in products with key nutrients (e.g., protein, gut health, etc.) to support their weight loss

Manufacturers can respond and adapt now to keep up and best meet consumer needs of this unending GLP-1 trend:

- Consider packaging/messaging to showcase specific higher levels of nutrition/protein, superior healthier ingredients, healthier recipes, portion control
- Innovate based on GLP-1 users' changing food and beverage consumption habits and dietary needs, which benefit the population as a whole
- Everyone can benefit from healthier yet tasty indulgent foods that complement a healthy diet, including less processed or better ingredient categories, more digestive solutions, and nutritional options

Questions?

For further information, please contact us at:

acosta.group

or

krisch@acosta.com

acosta group