



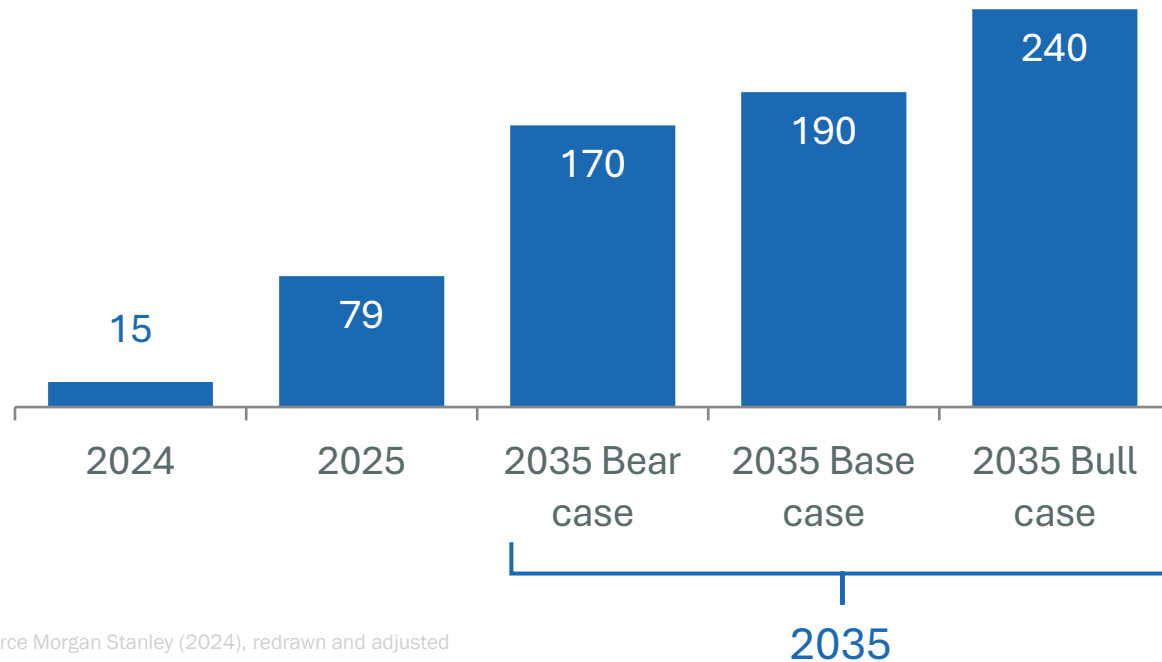
Beyond the needle

What GLP-1 means for brands, categories
and the consumer behind the prescription

July 29th 2026

From a niche therapy to a mass-market force

Global GLP-1 market, US\$ billions



Source Morgan Stanley (2024), redrawn and adjusted



A global consumer phenomenon



Adoption is uneven across the globe



**12% USA
population**

~31 million



Adoption is uneven across the globe



**12% USA
population**

~31 million



3% UK

~2 million



Adoption is uneven across the globe



**12% USA
population**

~31 million

3% UK

~2 million

<1% Australia

~0.2 million



Prescription-only everywhere

+ wide array of local regulations



Victoza[®]

RYBELSUS[®]
リベルサス[®]

Saxenda[®]

OZEMPIC[®]

wegovy[®]

CagriSema[®]
Novo Nordisk


mounjaro[®]

zepbound[™]

once daily
Foundayo[™]
(orforglipron)
tablets



GLP-1 in plain terms



The gut releases GLP-1,
a natural hormone



GLP-1 in plain terms



You eat



**Insulin
responds**

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a natural hormone

GLP-1 prompts insulin
only when blood sugar is high



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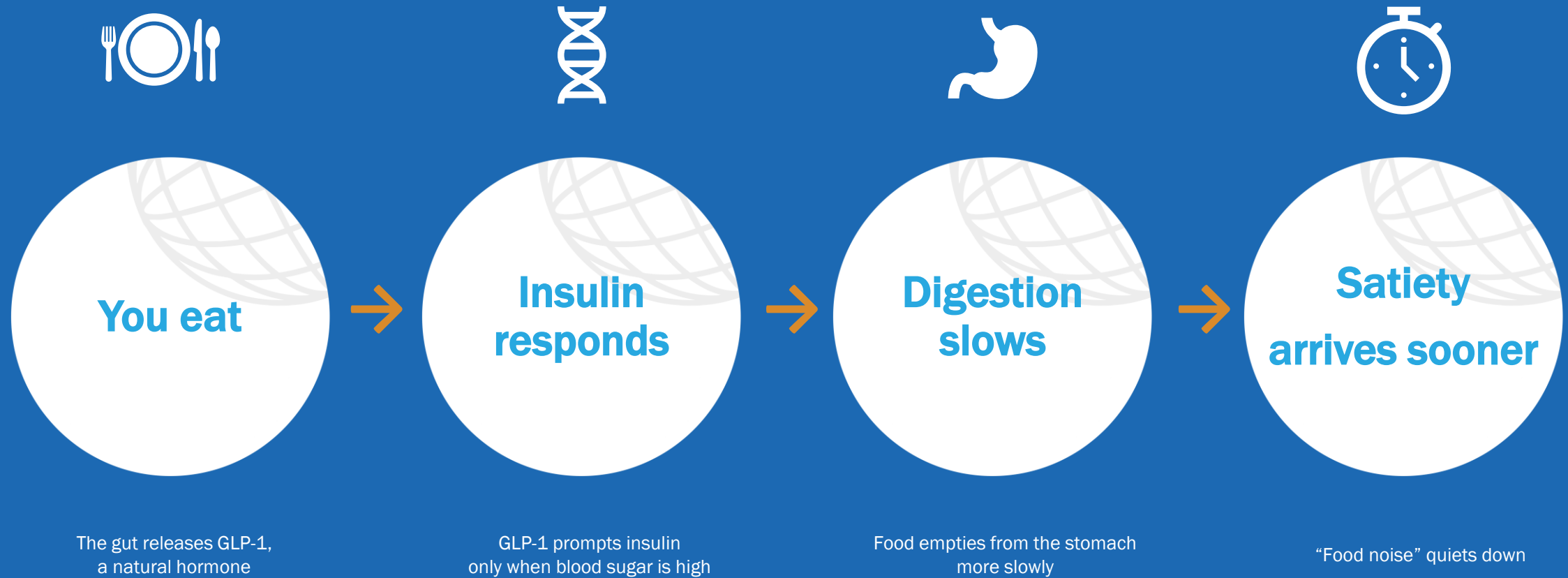


**Digestion
slows**

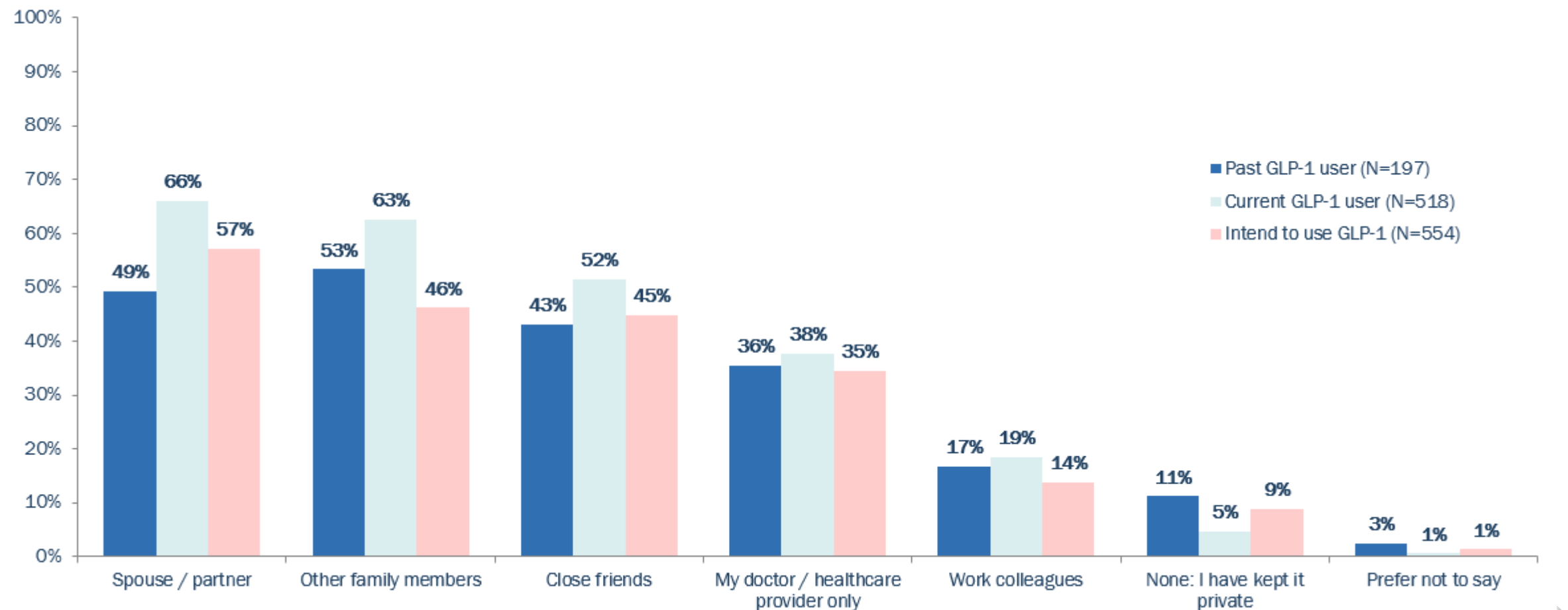
Food empties from the stomach
more slowly



GLP-1 in plain terms



Whilst GLP-1 users aren't ready to disclose their use to close ones, they told us



Q1. Who in your life is aware that you have been or are currently taking GLP-1 medication?
Q2. Who in your life do you intend to tell about taking GLP-1 medication?

Source: CRG Global, July 2026, N=1,269



There is no single “GLP-1 user / consumer”



**Longer term
Clinical**



**Shorter term
Cosmetic**



**“Zebra striping”
Most likely cosmetic**



**Considering
Clinical / Cosmetic**



The users' tensions

Some of the good

- Health / Metabolic benefits
- Calorie decrease
- Reduce craving for: high-fat, high sugar food and beverages, alcohol



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Some of the not so good

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- Lean muscle / bone density loss
- GI side effects
- Olfactory & taste impairment
- Skin laxity and volume depletion



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The unexpected : Craving drops but desirability remains



One drug → Ripples across every category



Food & Grocery



Alcohol, Beverage
& Hospitality



Vitamins, Minerals & Supplements



Beauty, Skincare & Fragrance



Aesthetics, Post-surgical
& Cosmetic care



Fashion, Apparel & Retail



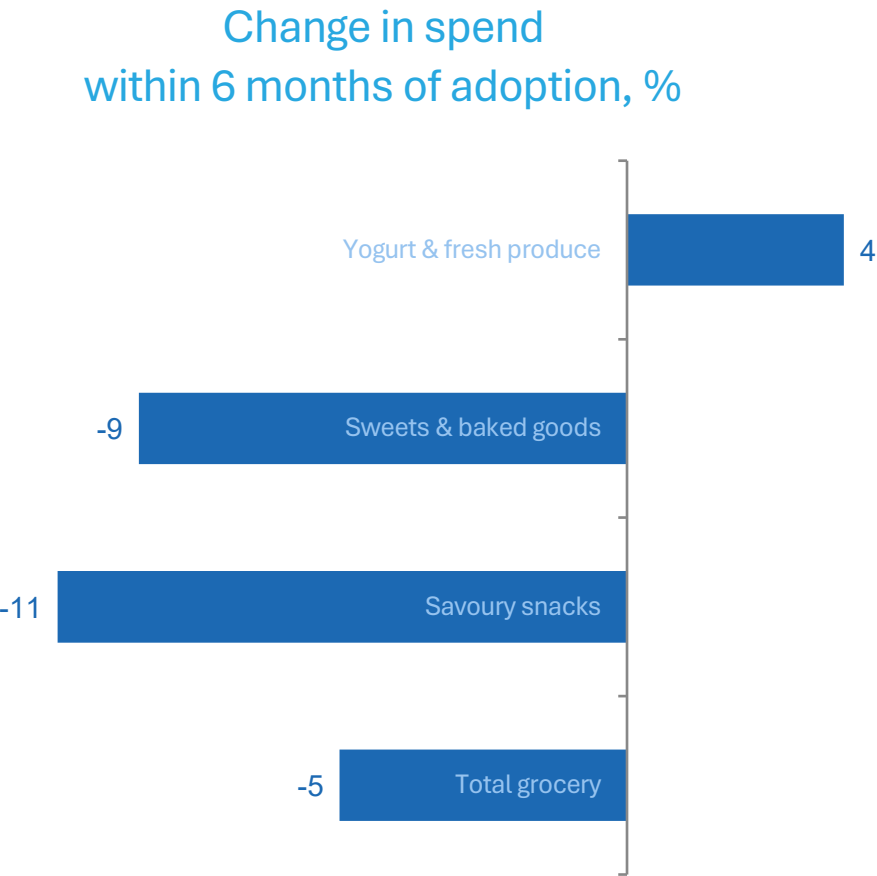
Fitness & Coaching



Telehealth & Pharmacy



Food & Grocery : a structural headwind

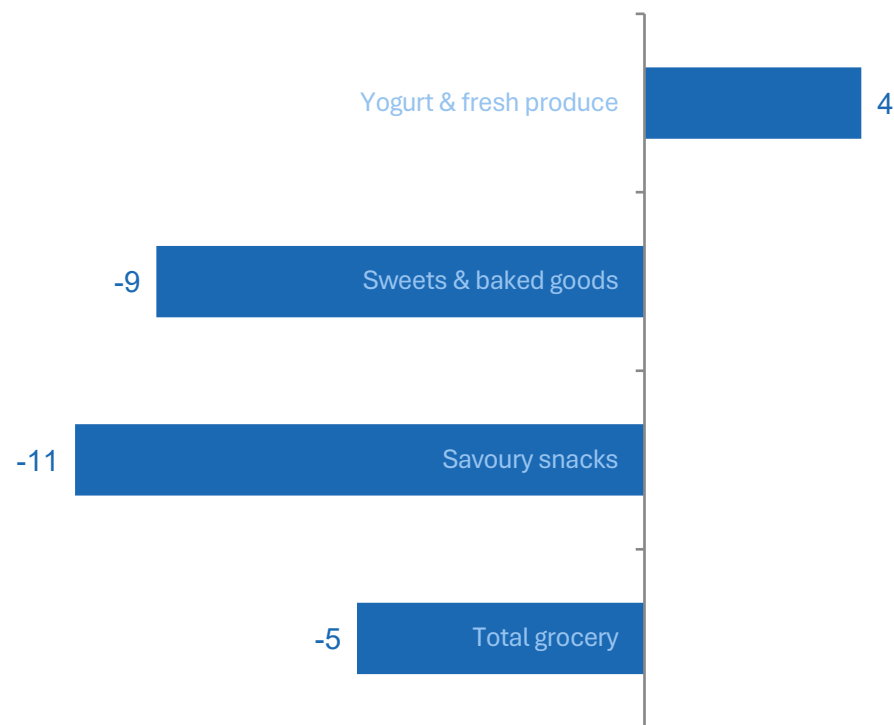


Source: Hristakeva et. al (2026), redrawn and adjusted



Food & Grocery : a structural headwind

Change in spend
within 6 months of adoption, %



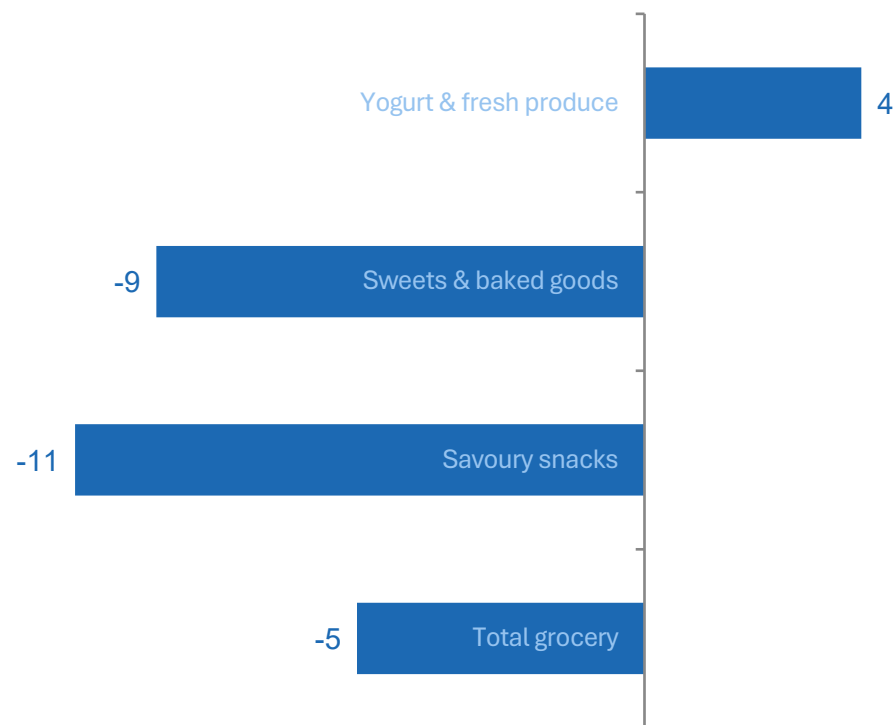
- Industry response is reformulation, not retreat.

Source: Hristakeva et. al (2026), redrawn and adjusted



Food & Grocery : a structural headwind

Change in spend
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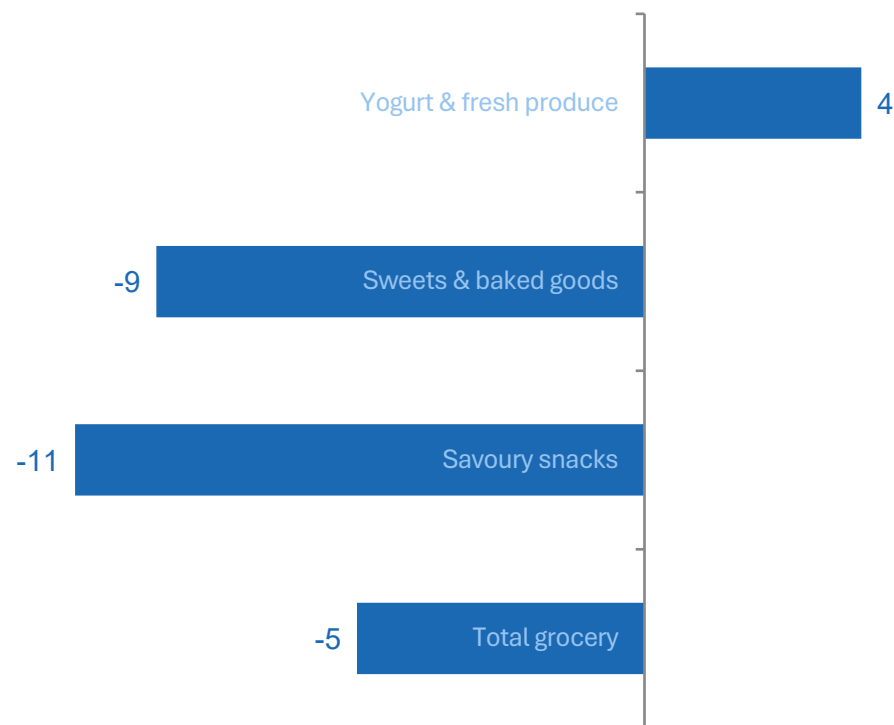
- Industry response is reformulation, not retreat.
- **Micro-indulgence is a live opportunity:** small-format dark chocolate and gum are both finding a place in the basket

Source: Hristakeva et. al (2026), redrawn and adjusted



Food & Grocery : a structural headwind

Change in spend
within 6 months of adoption, %



- Industry response is reformulation, not retreat.
 - **Micro-indulgence is a live opportunity:** small-format dark chocolate and gum are both finding a place in the basket
- Smaller portion offering
- Healthy(ier) choice ranges
- Messaging around satiety & health rather than volume

Source: Hristakeva et. al (2026), redrawn and adjusted



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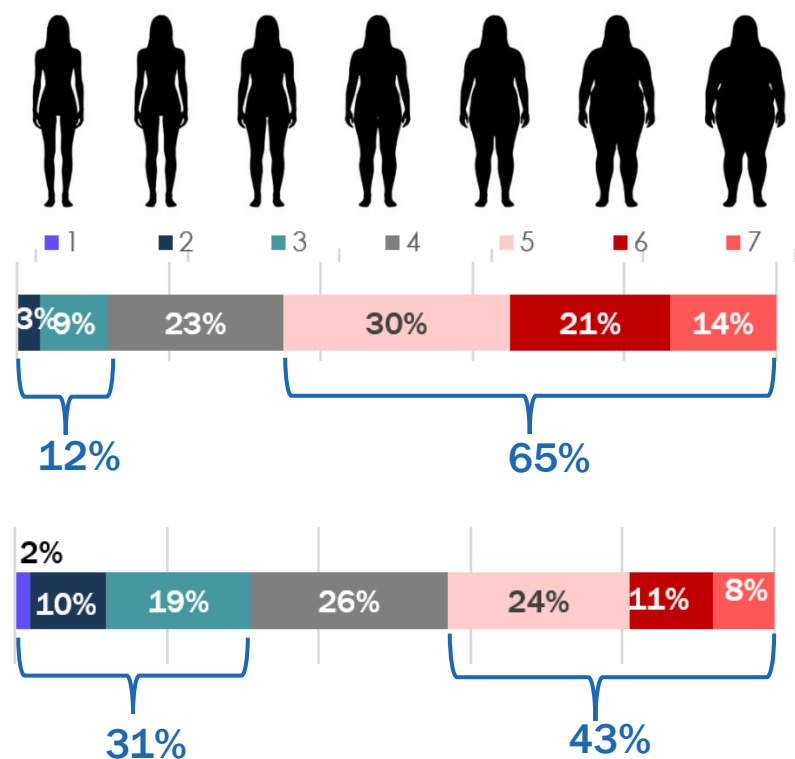
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Telehealth & Pharmacy

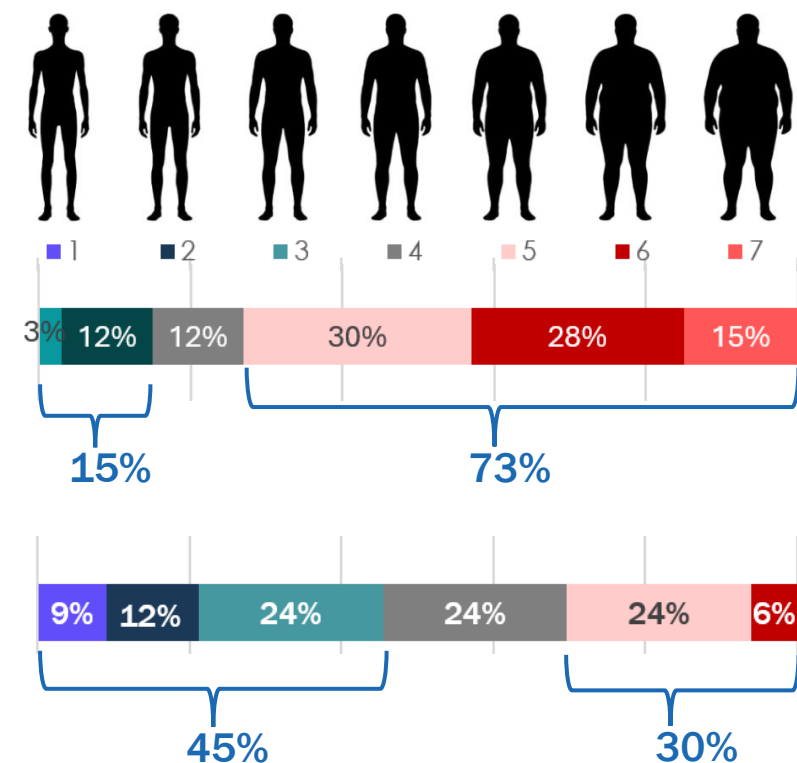


Declared body shape pre- vs. post-treatment



Pre-treatment

Post-treatment



Q1. Which image below best represents your natural body shape before you used any GLP-1 treatment?
Q2. Which depiction best describes your CURRENT body shape?

Source: CRG Global, July 2026, N=1,259



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Tensions every brand has to navigate



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**Saving vs
cost concerns**



Tensions every brand has to navigate



**Quality vs
quantity**



Tensions every brand has to navigate



**Visibility vs
stigma**



**The impacts on the CPG industry and beyond
are only ripples today.**

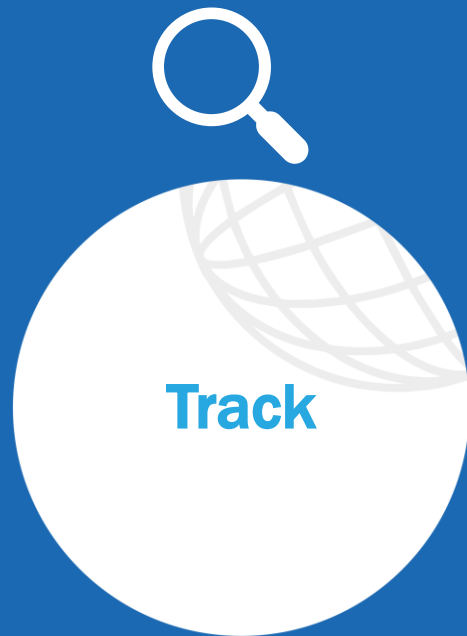
The tsunami is yet to come.



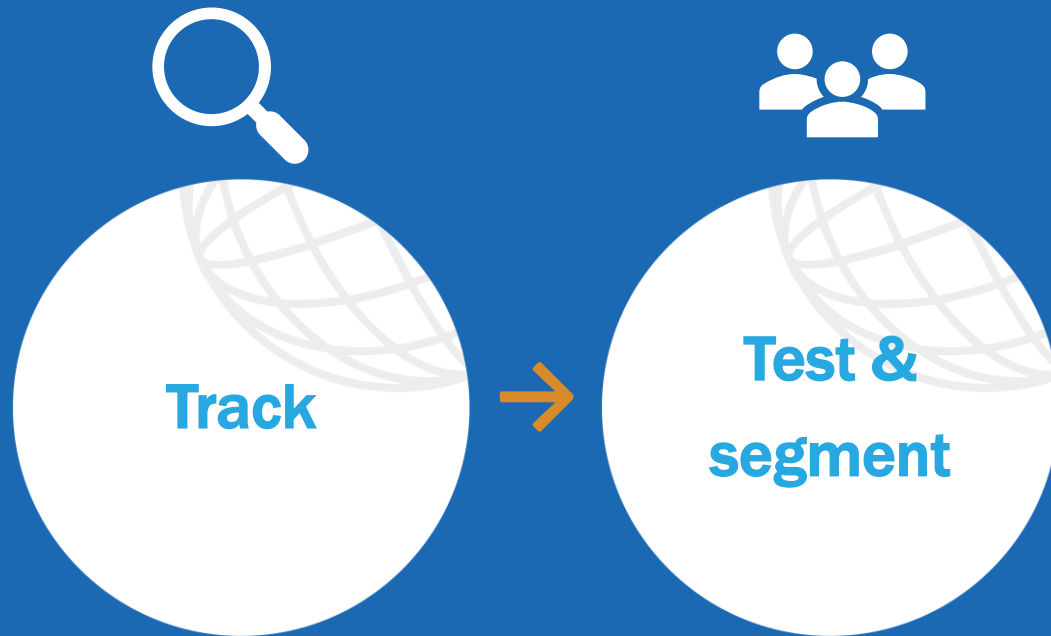
From simple tracking to shaping category strategy



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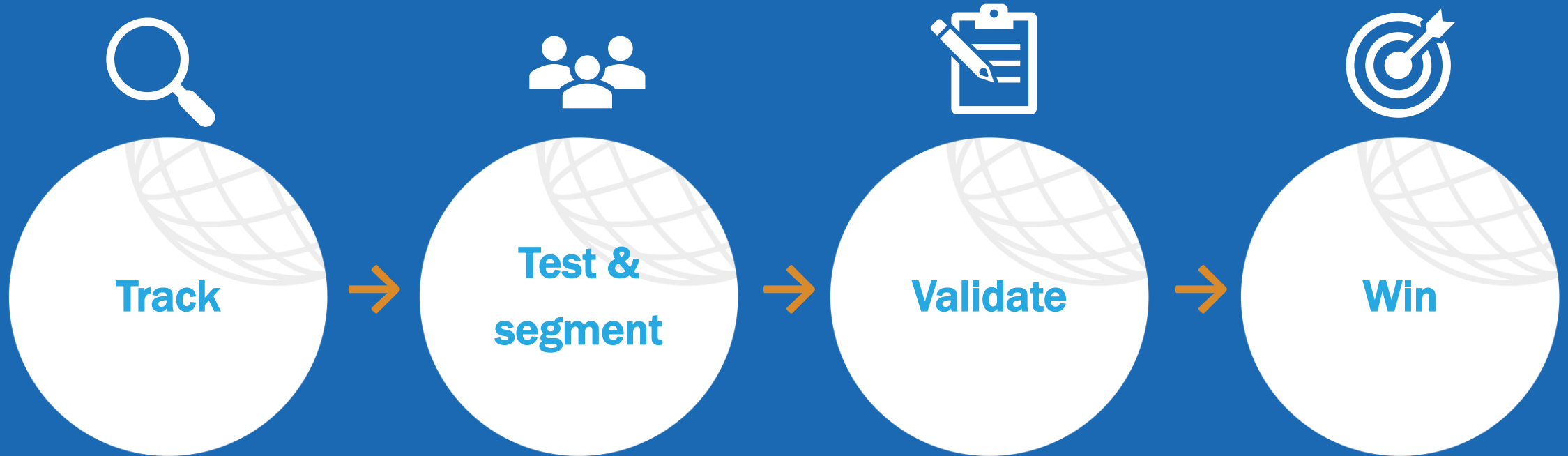
From simple tracking to shaping category strategy



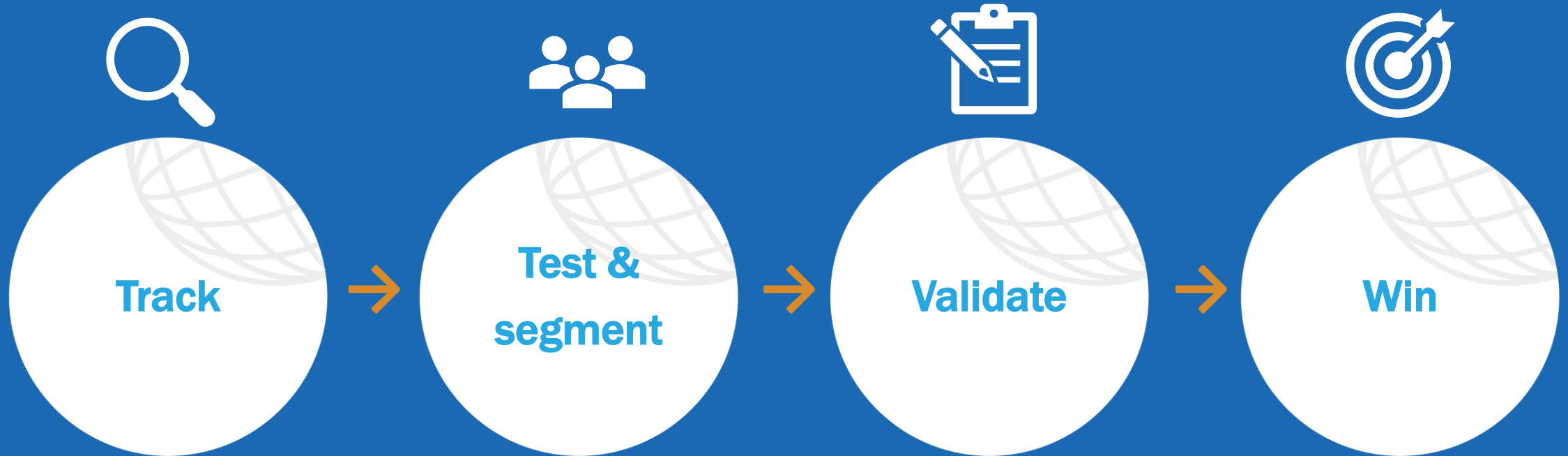
From simple tracking to shaping category strategy



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From simple tracking to shaping category strategy



Using dedicated GLP-1 consumer panel across markets



Beyond the needle How to embrace the tsunami



Beyond the needle

How to embrace the tsunami

1

Robust predictive
approaches

→ models based
on (even recent)
past data won't
get you the full
picture



Beyond the needle

How to embrace the tsunami

1

Robust predictive approaches

→ models based on (even recent) past data won't get you the full picture

2

Relevant segmentation

→ this is no longer demographics



Beyond the needle

How to embrace the tsunami

1

Robust predictive approaches

→ models based on (even recent) past data won't get you the full picture

2

Relevant segmentation

→ this is no longer demographics

3

Show-up with consumers' benefits

→ NOT labels





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Thank you

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