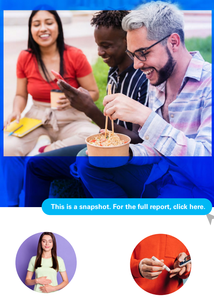
KPMG

Fact, fiction, or future?

How GLP-1s are reshaping the global food system

KPMG. Make the Difference.



This is a snapshot. For the full report, click here.

What GLP-1 drugs do



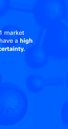
Suppress your appetite

You feel full faster and want less food (eat 20-30% less)



Slow your stomach

Food stays longer, so you stay full and blood sugar doesn't spike



Fix blood sugar

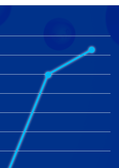
More insulin when needed, less sugar released by liver

Forecast GLP-1 market growth to 2036



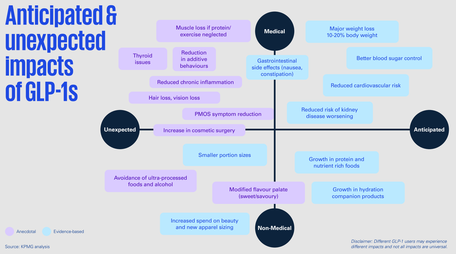
Global GLP-1 market projections have a **high range of uncertainty.**

Source: KPMG analysis based on data cited from FactMR, *GLP-1 Market Report*. Accessed on 05.06.26.



GLP-1 interest and adoption has accelerated quickly in recent years

GLP-1 adoption compared with other drugs and technologies (time to reach 100m global users)

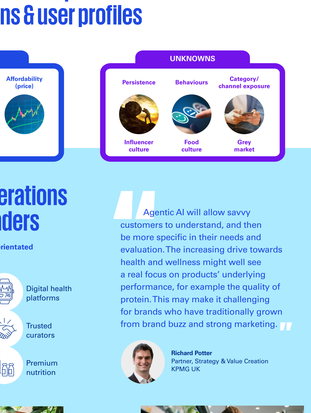


Sources: KPMG Analysis based on:
GLP-1 VIAL, *Obesity World*, 2025, accessed 10 September 2026.
The Pill: UK, *Contraceptive Use by Method*, 2019.
Statin: ScienceDirect, *Trends in lipid-modifying agent use in 83 countries*, 2021.
Iphone: Statista, *Number of active Apple iPhone units worldwide from 2007 to 2024*, accessed September 2026.
TikTok: CNBC, *TikTok Reveals Detailed User Numbers for the First Time* August 24 2020, and Thinkimpact, *TikTok Statistics*, 2025.
Chat-GPT: Similarweb, accessed 10 September 2025



Google searches of GLP-1

Source: Glimpse by Google trend accessed on 31 July 2026



Anticipated & unexpected impacts of GLP-1s



Source: KPMG analysis

Disclaimer: Different GLP-1 users may experience different impacts and not all impacts are universal.

Understanding GLP-1 adoption: knowns, unknowns & user profiles



Strategic considerations for Consumer leaders

The winners are likely to be outcome-orientated brands including:

- Products with demonstrable utility
- Digital health platforms
- Wellness ecosystems
- Trusted curators
- Intentional not impulse-based
- Premium nutrition

> "Agentic AI will allow savvy customers to understand, and then be more specific in their needs and evaluation. The increasing drive towards health and wellness might well see a real focus on products' underlying performance, for example the quality of protein. This may make it challenging for brands who have traditionally grown from brand buzz and strong marketing."

Richard Potter
Partner, Strategy & Value Creation
KPMG UK

Considerations for Food manufacturers

Key GLP-1 Implications

- Lower overall calorie consumption and reduced demand for indulgent categories
- Growth in protein, fibre, hydration and nutrient-dense products
- Shift from 'more food' to 'better food'
- Increased demand for smaller portions and satiety-focused products
- Potential decline in ultra processed foods, confectionery, sweet bakery and snacks
- Decline in impulse or convenience product sales

Risks and opportunities

High exposure for categories dependent on volume, impulse purchasing and large formats

Strategic Responses

- Shift from calories to nutrition – compete on protein, fibre, micronutrients, satiety
- Build outcome led portfolios – innovation around weight, ageing, muscle preservation
- GLP-1 companion products through the GLP-1 journey
- Invest upstream not just downstream – coinvest with farmers and ingredient suppliers
- Prepare for agentic commerce that curates for a GLP-1 journey
- Acquire capabilities not brands – particularly with a food, health, wellness, social media intersection
- Think household not user
- Prepare innovation ahead of social media trends
- Anticipate the next consumer-health intervention, not just the next food trend
- Build innovation pipelines around emerging health, longevity and aesthetic behaviours before they reach the mainstream

Considerations for Grocery retailers

Key GLP-1 Implications

- Basket sizes decline as consumers purchase fewer calories
- Increased demand for fresh foods, protein, supplements and hydration
- Shift toward online, subscription and auto-replenishment models
- Opportunity to become part of broader weight-management ecosystems
- Pharmacy and nutrition increasingly converge
  - Reduced promotional intensity for impulse categories

Risks and opportunities

Reduced sales in impulse categories, alcohol, confectionery and snacks

Strategic Responses

- Create dedicated health and protein zones, consider the role of responsible curation to help consumers make better decisions regardless if they are on GLP-1s or not
- Expand private label and household ranges with GLP-1 users in mind
- Develop pharmacy-led ecosystems
- Improve shopper segmentation and personalisation
- Reallocate shelf space away from declining categories
  - Focus on categories aligned with 'intentional' spending e.g. fitness, preventative care

For implications for other sectors, such as Fashion, Restaurants and beauty, see the full report.



Get in touch



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