

The impact of GLP-1s in an era of disruption

A Hartman Group white paper

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From a pharmaceutical breakthrough to an industries-wide disruptor

What happens when a single class of drugs begins to rewrite the rules of appetite, consumption and culture?

Since gaining FDA approval in 2021, semaglutides—better known as GLP-1 drugs—have emerged as one of the most transformative pharmaceutical breakthroughs of the decade. Adoption has surged dramatically, more than doubling from 2024 to 2025. And yet, this meteoric rise is likely only the beginning. GLP-1s represent more than a scientific milestone. They are reshaping cultural and economic landscapes, with ripple effects reaching far beyond healthcare—perhaps none more profound than in the food and beverage industry.

CALL FOR CULTURAL CONSIDERATION

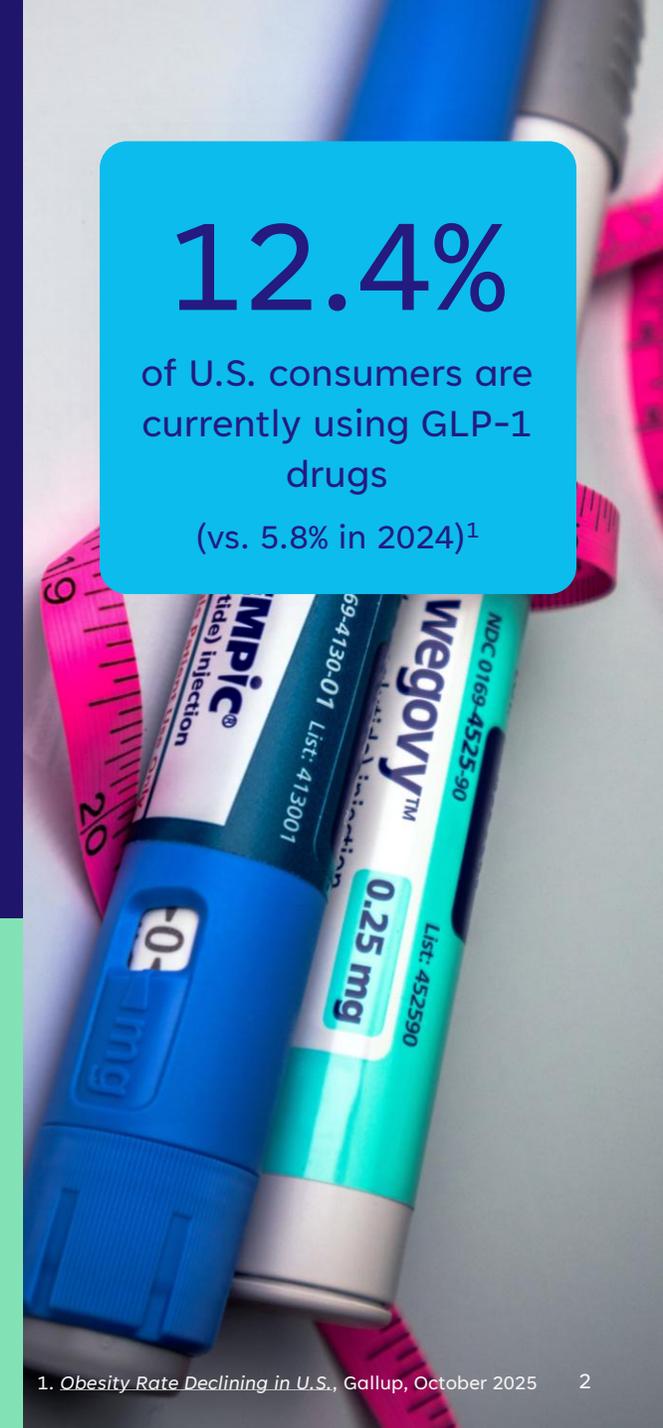


For food and beverage leaders, the question is no longer *if* GLP-1s will influence their categories, brands and service models, but *how*. While the discourse to date has largely focused on how companies can be operationally agile, most analysis is missing a culturally informed, consumer-centric perspective. However, that's precisely what is needed for companies to respond to the changing landscape, anticipate shifting behaviors and reimagine business realities before they fully take shape.

12.4%

of U.S. consumers are currently using GLP-1 drugs

(vs. 5.8% in 2024)¹



Despite this breakthrough moment, the trajectory for GLP-1s is still uncertain

The adoption curve of GLP-1s and the subsequent evolution of trends will hinge on a variety of unsettled macro factors. For example...

Ongoing data about GLP-1 efficacy, benefits and long-term safety/impacts

Shifts (*positive or negative*) in mainstream consumer confidence and adoption

Continued pushback from some consumer factions, on philosophical or scientific grounds

Role of public and private insurance coverage to enable access

Patterns of adherence and if long-term use becomes akin to treating conditions like blood pressure

Evolving product landscape and new service models, including beyond “big food”

Access and adoption may be the biggest factors in which trends emerge and how the industry responds

Will GLP-1s remain relatively niche or achieve mass adoption?

Currently, GLP-1 use reflects a bifurcated, K-shaped economy, with companies engaging two contrasting groups: affluent consumers pursuing wellness optimization and seriously ill patients able to bypass systemic access barriers.

The prospect of mass adoption will magnify the scale of disruption and create a huge diversity of consumer segments, needs and opportunities to solve for. With some studies noting that more than half of the U.S. population meets the FDA's criteria for GLP-1 use, the runway for such adoption is long.¹

1. Based on the following data:

- *U.S. Adult Population Grew Faster Than Nation's Total Population From 2010 to 2020*, US Census Bureau, August 2021
- *More Than Half of U.S. Adults Could Benefit from GLP-1 Medications, Researchers Find*, Beth Israel Deaconess Medical Center, November 2024
- *Poll: 1 in 8 Adults Say They Are Currently Taking a GLP-1 Drug for Weight Loss, Diabetes or Another Condition, Even as Half Say the Drugs Are Difficult to Afford*, KFF, November 2025

GLP-1 usage in the U.S.¹



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Calls for more affordable access to GLP-1s are the latest in an ongoing critique of inequality in the health system. If GLP-1s achieve greater democratization and widespread adoption, it will raise new opportunities and new questions. The first being: "Who is the GLP-1 consumer?" Then "Who could be but *isn't*?" And "How is the landscape being transformed for *all* consumers—not just those using these drugs?"

GLP-1s have sparked a new cultural and scientific debate about obesity

Where does biology end and choice begin?

For years, consumers believed that weight and metabolism were determined by a simple equation: caloric intake minus metabolic output. Achieving this balance was a matter of sheer willpower.

But science is revealing a far more intricate—at times tenuous—equilibrium: the gut and brain are in constant conversation, negotiating hunger, fullness and behavior. GLP-1 drugs have thrown open the doors to this dialogue, spotlighting the gut-brain axis and challenging old assumptions about what “normal” appetite and healthy weight really mean.

62%

of all U.S. adults are actively managing weight¹

67%

of GLP-1 users say taking it has “changed how [they] thought about weight management”²



Oprah Says "Enough" to the Stigma Around Weight

Enough: Your Health, Your Weight, and What It's Like To Be Free is Oprah Winfrey's new book with Dr. Ania Jastreboff (released Jan 13, 2026). In it, she details her personal journey with weight struggles, addressing decades of shame, yo-yo dieting and the decision to use medication.

1. *Health and Wellness 2025: The Interplay of Vitality and Longevity*, Hartman Group

2. *Health Benefits 2024: From Energy to Immunity*, Hartman Group

Growing acceptance of GLP-1s is accelerating a paradigm shift that reframes obesity as a medical issue to be treated rather than a personal failure



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All companies must reconsider how themes like identity, personal control, shame, social status and aesthetics are shaping beliefs and shifting expectations for product development and branding.

In addition, *food and beverage companies* will grapple with new industry-specific realities:

- Weight management will be viewed and treated through a science-first lens, encouraging an embrace of medicines such as GLP-1s.
- Food will remain the primary avenue for weight loss, but the idea of “food as medicine” will take on new meaning as products are expected to uniquely complement pharmaceuticals.
- The mandate for food engineering will shift as appreciation for functional foods, inherent nutrient density and pleasure grow in equal measure.



Evolving science is extending the possibilities for GLP-1 use beyond obesity, igniting a greater understanding of holistic wellness

What more will microdosing unlock for GLP-1-enabled interventions?

From worries about digestive issues and hair loss to “Ozempic face,” enthusiasm for GLP-1s has been tempered by potential side effects. However, knowledge is growing about distinctions between semaglutides and how different types, brands and dosing strategies can be dialed into an individual’s biology and needs. As part of this correction, *GLP-1 microdosing* has emerged to help mitigate negative side effects and attenuate the rapidity of weight loss.

Moreover, microdosing is turning out to be a multiplier for users. It’s going beyond diabetes and obesity and has recently been approved for the treatment of heart disease, liver disease and other conditions.^{1, 2} Day to day, users are also reporting improvements in areas like energy, mobility and sleep. These meaningful impacts on health and vitality are encouraging trial and prolonging the use of GLP-1s. And it’s raising questions about if an even greater number of consumers would benefit from these drugs and what the future adoption curve may look like.

1. *The GLP-1 Effect: Beyond Weight Loss and Into Longevity*, US News, January 2026

2. *The expanding benefits of GLP-1 medicines*, Cell Reports Medicine, July 2025

What began as a tool for obesity-related concerns is becoming a catalyst for a larger health awakening

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Consumer curiosity about the science behind GLP-1s is driving a broader understanding of gut health, hormonal balance and anti-inflammation—areas once reserved for “progressive” wellness circles. The ripple effect? A cultural merge between mainstream health behaviors and once-niche wellness philosophies.

It also raises a potential future scenario: *Might GLP-1 users and “progressive” non-users start to think about certain wellness topics in similar ways?* While these groups will differ in their use of (this) medicine as a tool, they’ll share an interest in using foods, beverages and other products to address the common roots of disease. **Expect consumers—GLP-1 users and non-users alike—to be seeking things like protein, fiber, probiotics, prebiotics and plant-based functional ingredients.**



As GLP-1s quiet the “food noise,” revenue concerns for the food and beverage industry are amplifying

What happens to the food industry when consumers can finally curb their cravings?

Beyond losing weight, GLP-1 drug users widely report a quieting of “food noise,” the incessant cravings and preoccupation with food that undermine mental wellbeing and make healthy choices and portions challenging to achieve. *This internal quieting is dampening sales.* Data show that GLP-1 households are successfully decreasing consumption overall—most notably for processed foods—while increasing the consumption of fresh fruits and vegetables.^{1, 2}

Impact on spending¹ <i>Among GLP-1 households</i>	-5.3% overall grocery spending	-10.1% savory snack spending	-8.0% QSR food service*
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1. *The No-Hunger Games: How GLP-1 Medication Adoption is Changing Consumer Food Demand*, Journal of Marketing Research, December 2025 (*defined here as: fast-food chains, coffee shops and limited-service restaurants)

2. *Ozempic is changing how we spend money and time, plus what we eat*, The Washington Post, December 2025

3. *Health Benefits 2024: From Energy to Immunity*, Hartman Group

Results of taking GLP-1³

Among GLP-1 users



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The food industry's silver bullet for highly profitable, craveable foods is being met with a competing silver bullet for resisting them. With the struggle to maintain control seemingly gone, the industry is being called upon to reconsider its objectives for food engineering and innovate for consumers' desires rather than their chemical cravings.

Although volumetric losses are a true threat, the industry may be missing the bigger point and opportunity

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Much of the discourse has been hyper-focused on potential volume/revenue losses, contributing to an industry panic that misses a more nuanced, even *optimistic*, conversation.

Business leaders should be thinking about how consumers are eating *differently*—yes, in terms of quantities—but more so in terms of quality expectations, emerging needs, shifting occasions and a new understanding of benefits viewed through the GLP-1 lens.

The most imminent threat to the food industry may not be smaller appetites, but rather a culture-wide critique of processed food

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GLP-1 users believe these drugs are exposing the roots of a fraught relationship that many consumers have with manufactured food. It's introducing *viral terminology* (e.g., “food noise”) that even consumers who are not diagnosed with a GLP-1-related disease are attesting to. As we look to the future, consumers are likely to seek non-medicinal ways to circumvent food noise and will be expecting food companies to address this via product formulation.

GLP-1s are adding new momentum to a decades-long shift:



Critique of the food system and expectations of shared accountability



Mainstreaming of the directive to eat fresh, less-processed food



Concern about processed food's impact on disease, including but not limited to weight



Resetting product expectations for whole, recognizable and nutrient-dense ingredients



“GLP-1 friendly” marketing may yield temporary returns; but on its own is a superficial response to a deeper demand

Can a claim win (back) defectors and attract new segments?

- + Convenient navigational aid, especially for users relearning to shop and reevaluating brands.
- + Signal for *non-users* that the product aligns with shared nutritional needs, such as high protein, low sugar (i.e., If it’s healthy enough for GLP-1 users, it’s good enough for me!).
- May pigeonhole products via a dietetic positioning or signal bad taste in the way that “low-fat” and “lite” have done in the past. This danger is highest among non-users, who may be put off by GLP-1’s baggage as a medicalized intervention.
- Potential danger of “health-washing” (a la “Atkins-approved” and “Keto-friendly”) if ingredient panels and nutritional facts don’t provide substantive evidence of nutritional density.

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➔ While “GLP-1 friendly” is a low-hanging messaging play, it nonetheless carries risks of backlash and undermining brand equity. The ultimate call-to-action? Ensure product reformulation, new product innovation and overall portfolios reflect the ingredients, nutritional profiles and benefits that are here to stay for the *long-term* and that both users and non-users will be prioritizing.

As a result of using GLP-1s ...¹

27%
of GLP-1
users report

**choosing foods
specifically designed
for GLP-1 users**



1. *Health Benefits 2024: From Energy to Immunity*, Hartman Group

Future demand will focus on ingredients that boost the body's natural GLP-1 production and on benefits that optimize outcomes



Satiety, glucose regulating

Fiber—particularly resistant starches—help regulate blood sugar, while helping GLP-1 users with constipation side effects.

50%
digestive
regularity¹

69%
fiber¹



Muscle/strength building

Sources of complete protein support muscle mass, a key lynchpin for metabolism and a vulnerability of GLP-1 use.

67%
physical
fitness¹

75%
protein¹



Gut healing

Fermented foods and beverages target the body's hormone-production center (including GLP-1), promoting microbiome balance.

56%
gut health¹

56%
probiotics/
prebiotics¹



Inflammation extinguishing

Healthy fatty-acids, antioxidants and phytochemicals counteract systemic inflammation, an underlying benefit emerging from GLP-1 use.

44%
chronic
inflammation¹

55%
Omega-3s¹

Percentage of total consumers: **managing benefits** and **seeking/adding ingredients**

Desire for realness, functionality and pleasure in equal measure will reset the objective for innovation and food engineering

How does eating feel different for GLP-1 users?

GLP-1 users are tasting differently as well as experiencing the physical side effects of processed food more acutely. This points to two realities:

1. *An impressive nutritional panel isn't enough.* Consumers will be especially sensitive to items they perceive as hyper-engineered, rather than inherently nutritious.
2. *Food must taste great.* There's no place to sacrifice flavor in the name of heroic fortification.

Could some people be eating less but enjoying more?

As GLP-1 users consume less, it is raising the stakes for every sip and bite to do more—not just physically, but emotionally and socially.

This has led some in the industry to forecast a “premium pivot” in which GLP-1 users will be trading up more often, thereby neutralizing revenue losses.

We believe this is a likely scenario, at least for a *subset* of users. However, it will require an evolving understanding of what premium means for these users.

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GLP-1 users are requiring the food and beverage industry to master a new mission: thread the needle between experience and health, taste and functionality, all while centering intrinsically present benefits. Brands will have to deliver products that demonstrate care and craft—and not just symbolically or with packaging. Consumers will look to elevated taste, visual appeal and engaging design as evidence of food's realness.



The industry has mostly focused on what GLP-1 users are doing less, but there's an opportunity to lean into what they're doing more

Fluidity of snacking

➤ Mindless, indulgent-driven snacking is under threat, but intentional nutrient-driven snacks are likely on the rise. Smaller portioned meals may mean that morning and mid-day meals look more like a scaled-up snack.

WHERE PORTION AND PURPOSE MEET

Snacks with improved nutritional bona fides, not just smaller portions of “filler” food.

Snacks that can be customizably “stacked” to create variety, scalable portions and personalized nutrition profiles.

Enduring relevance of meals

➤ GLP-1 users are eating out less, but they're cooking at home more. Companies can be partners on occasions, especially for consumers who feel they need to “re-learn” to cook or may be balancing meal prep for multiple people and needs in the household.

CALL FOR CONVENIENCE AND CREATIVITY

Inspiration and education on basic cooking skills, with meal prep hacks that offer speed and flexibility.

Help for cooks needing to dial up flavor and enjoyment, as they broaden their repertoire with nutrition in mind.

The cultural considerations raised here are just the tip of the iceberg...



Announcing Hartman Group's upcoming special report: *GLP-1s: Seizing Opportunity in a New CPG Landscape*

GLP-1s: Seizing Opportunity in a New CPG Landscape will offer robust quantitative and ethnographic research, contextualized by cultural perspective to uncover key questions the industry must answer to understand not only what has shifted, but what hasn't changed and what's next. For example...

CULTURE

How are beliefs about obesity, disease and intervention changing? Which beliefs are entrenched vs. being disrupted?

What is the degree of GLP-1 awareness? How do users and non-users, "acceptors" and "rejectors," perceive its influence on health and aspirations?

CONSUMERS

Who are the "GLP-1 consumers" of today and tomorrow? Where do they intersect and diverge with existing segmentations?

What are the attitudes, behaviors and choices reflected in this increasingly diverse "GLP-1 cohort" and where are needs most underserved?

CATEGORY

What are the product-level attributes, benefits and occasions the food industry must prioritize? How does this vary by category and channel?

What does it mean to create value for users across the financial spectrum? Will innovation positioned for more meaningful experiences come at the expense of value-driven innovation?

The rise of GLP-1s has already impacted consumers' use of categories and channels; this study explains how, why and what it means for the future of culture, consumers and commerce

Capturing the usage and attitudes for key retail channels and “pace-setter” product categories, the study will identify emerging perceptions and expectations, new patterns of behavior and exciting opportunities—among GLP-1 users and gen pop alike.

CHANNELS INCLUDED

(capturing past-3-month shoppers)

- Grocery stores
- Mass merchandise
- Natural/specialty stores
- Club stores
- Dollar
- Discount
- Drugstores
- Online

CATEGORIES INCLUDED

- Fresh produce
- Fresh meats and seafood
- Refrigerated dairy foods
- Salty snacks
- Bars
- Sweets/confections
- Frozen entrees/meals
- Packaged breads
- Packaged meats
- Nutritional shakes
- Carbonated soft drinks
- Packaged alcoholic beverages

AREAS OF INQUIRY COVERED FOR EACH CATEGORY:

- P3M purchase
- Perceptions of category nutritiousness and support of wellness goals
- Changes in consumption patterns (driven by range of factors, including use of GLP-1s) and reasons for change
- Specific challenges and benefits related to GLP-1 experience (for users)
- Interest in GLP-1 communication (broader messaging and claims/certification on-pack)

Establishing usage and attitudes for these high-level channels and categories gives companies foundational insight to build on with proprietary research and insight.

Contact us about including your brand, category or channel for proprietary exploration and custom data tables.

Gain primary qualitative and quantitative consumer insights with strategic guidance—at a fraction of custom research costs

Robust integrated methodology

Quantitative Research: Online survey of n=2,100 U.S. consumers aged 18-80, including an over-sample of GLP-1 current and former users, yielding a minimum of n=1,000 current GLP-1 users, and enabling readable audiences for key demographics such as age cohorts, race/ethnicity, income tiers and health status.

Qualitative Research: Online ethnography with a diverse mix of GLP-1 users and demographically representative non-users. Research will involve a brief engagement using our qualitative research platform paired with in-depth, virtual interviews with a subset of GLP-1 participants.

Final report available June 1, 2026

Report price: \$8,500 (until May 31, 2026; \$10,000 starting June 1)

A concise, visually dynamic PowerPoint report on study findings will include an executive summary, implications and strategic recommendations, supported by charts, visuals and consumer quotes.

A supplemental set of Excel data tables that provides views by key demographics and relationship with GLP-1 will accompany the report.

Proprietary categories, questions and/or custom data cuts may be available. Requests are handled on a first-come, first-served basis.

Contact us for a quote and for feasibility by March 16, 2026.

Turning insights into action

Please contact Melissa Abbott to learn more about how you can take your strategy to the next level with the insights from this special report: melissa@hartman-group.com.

Pre-order *GLP-1s*: Seizing Opportunity in a New CPG Landscape now

Report Price: \$8,500 (until May 31, 2026; \$10,000 starting June 1)

To purchase, please email: melissa@hartman-group.com

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ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients. Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

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