Beyond Appetite: Uncovering Hidden Opportunities in the GLP-1 Era

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PRESCOUTER

GLP-1 drugs are reshaping more than metabolism. They are disrupting addiction economics, shifting consumer health behaviors, and creating white space across pharma, food, supplements, and wellness. This report reflects observed consumer patterns, emerging scientific insights, and early market signals.

There is a first-mover advantage for brands that evolve beyond satiety and into sustained health support.

Lifestyle-linked solutions

Resistance training is key to maintaining lean muscle and **bone density** during **GLP-1 therapy**.

The growing need for physical activity support opens the door for active **lifestyle-focused products** that complement treatment protocols.

Strategically, these products can be positioned as part of a comprehensive **GLP-1 support package** —combining protein, physical activity, and bone health interventions for sustained outcomes.

Mental and side effects care

GLP-1 treatments are linked to improved **mental health** for many users. However, some experience **anxiety** or **compulsive behaviors** when discontinuing. Others face physical side effects such as **nausea** and **vomiting** during use.

A strategic response is **to integrate behavioral health support** and develop **targeted consumer solutions** to ultimately improve the overall **treatment experience**.

Reward system disruption

GLP-1 drugs influence **reward pathways in the brain**, reducing cravings for substances such as **alcohol** and **nicotine**.

The off-label effects of GLP-1 extends beyond weight loss, positioning them as candidates for treating **substance use disorders**—offering strategic implications for industries built around **habitual consumption**.

Comprehensive bone health

Bone health depends on more than just protein. **Calcium**, **vitamin D**, **magnesium**, **collagen**, and **zinc** all play critical roles.

Thus, there is an opportunity for **food and beverage** brands to create **formulations** that support **musculoskeletal health** more holistically —instead of focusing solely on **muscle preservation**.

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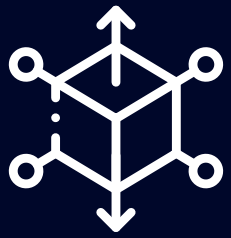


The Expanding Role **of GLP-1 Therapies**

GLP-1 receptor agonists are redefining chronic disease care beyond diabetes.

Glucagon-like peptide-1 (GLP-1) receptor agonists mimic a natural hormone that stimulates insulin production and lowers blood sugar.

Originally developed for type 2 diabetes, GLP-1s are now linked to benefits across multiple organs, showing positive effects in obesity, cardiovascular disease, and chronic kidney and liver conditions.

Evidence from 11 clinical trials (*Figure 1*) involving over 85,000 participants shows that GLP-1s may reduce the risk of major health events, including kidney failure, cardiovascular complications, and all-cause death.

Despite these benefits, it remains unclear whether GLP-1 receptor agonists protect organs through direct receptor activation or indirect via effects such as weight loss.

This highlights the need for targeted research to understand how these drugs work.

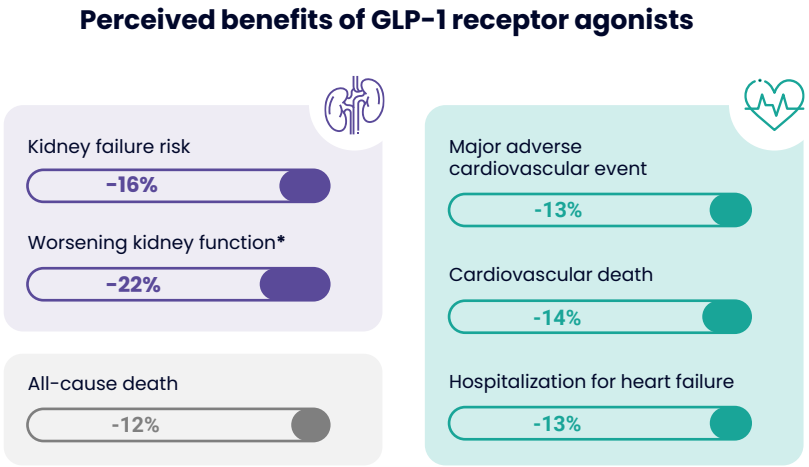


Figure 1. Pooled estimates of GLP-1 receptor agonist benefits in patients with type 2 diabetes, based on trials with at least 12 months of follow-up. * A 50% or more (or nearest equivalent) sustained reduction in eGFR. *Source*: *Badve et al. 2025*.

Chronic kidney disease affects 1 in 10 people globally—about 850 million. It's the 10th leading cause of death today and could rise to 5th by 2050. Diabetes, heart disease, and obesity are key risk factors. *Source*: *ISN*.

GLP-1 shows measurable impact on alcohol intake in early trials.

GLP-1 receptor agonists are thought to influence dopamine-driven reward pathways, which may contribute to reduced reinforcement from alcohol.

Key findings from a 9-week randomized clinical trial:

- Semaglutide, a GLP-1 prescription medication, reduced alcohol consumption by ~41% compared to placebo based on grams of alcohol consumed. (Figure 2).
- Semaglutide group consumed 25% less drinks per drinking day compared to the placebo group. In addition, weekly alcohol cravings declined significantly by 23%.
- 64% of participants in the semaglutide group reported zero heavy drinking days by the end of the study.

The trial involved 48 adults with alcohol use disorder who received weekly doses of semaglutide or placebo.

This latest study suggest that GLP-1s may support treatment for alcohol use disorder. However, larger clinical trials are needed to confirm these effects.

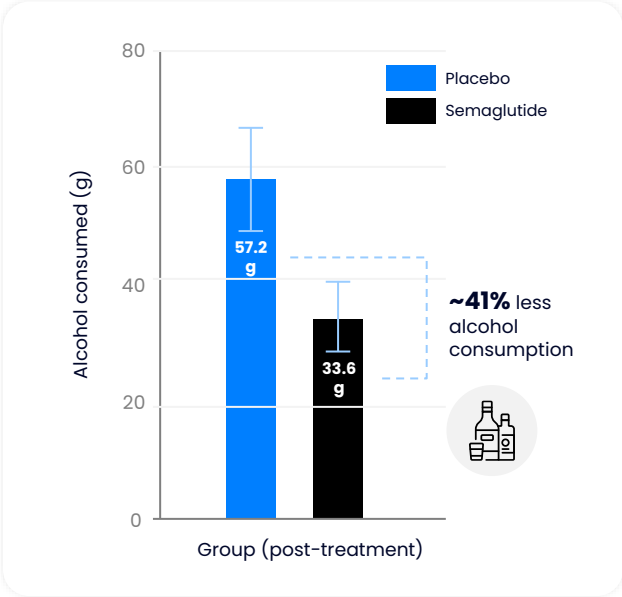


Figure 2. Mean (±SD) alcohol consumption among 48 participants after 8 weeks of treatment. Participants were randomized into two equal groups receiving either semaglutide or placebo. *Source:* *Hendershot et al. 2025*.

Nicotine use is declining among GLP-1 users, signaling potential disruption.

A 2025 randomized clinical trial investigated whether exenatide, a GLP-1 receptor agonist, could enhance smoking cessation when combined with nicotine patch therapy.

In a 6-week study of 84 smokers with prediabetes and/or overweight, weekly exenatide (2 mg) led to a higher abstinence rate (46.3%) than placebo (26.8%).

A secondary analysis identified factors associated with better response: smoking more than 20 cigarettes per day, absence of obesity or prediabetes, mild depression symptoms, and presence of the CHRNA5 rs16969968 GG genotype.

Exenatide improved abstinence rates in participants with and without obesity (*Figure 3)*, suggesting a role for GLP-1 supporting smoking cessation independently of BMI.

However, more clinical trials are needed to understand the mechanisms of how GLP-1 receptor agonists may support smoking cessation.

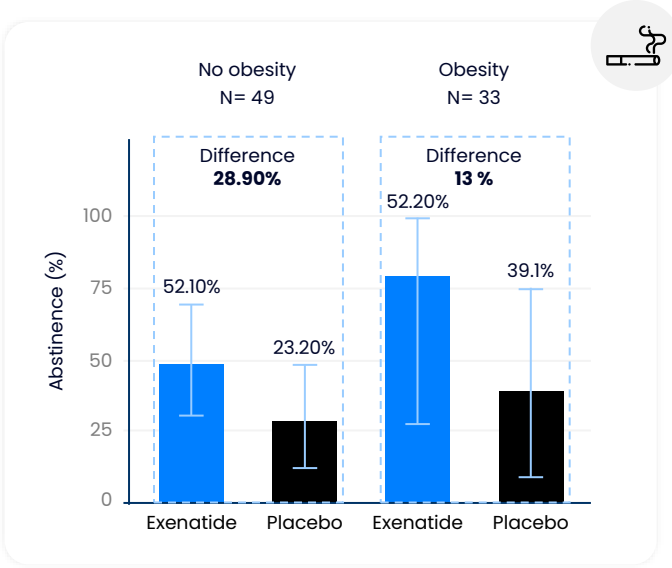


Figure 3. Smoking abstinence by BMI subgroup. Exenatide improved abstinence rates over placebo in both groups, with a larger effect in participants without obesity (28.9% vs. 13% difference). These results support BMI as a treatment response moderator and align with findings across other subgroups, including cigarette use and prediabetes status. *Source: Yammine et al. 2025.*

Smoking kills 400,000 Americans annually and causes disease in 16 million more. While most smokers want to quit, success rates remain low. *Source: USDHHS.*

Strategic Positioning
Assessment – Strengths

GLP-1 adoption is triggering measurable behavior shifts and new growth opportunities.

CAUSE

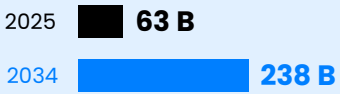
Widespread adoption across the U.S. market

~76% of the global GLP-1 receptor agonist market is concentrated in North America, which leads global GLP-1 adoption and commercial scale.

1 in 8 North American adults have used a GLP-1 agonist.

There has been a 700% increase in U.S. GLP-1 users without diabetes, from ~21,000 in 2019 to over 174,000 in 2023.

GLP-1 receptor agonist market size*



*Market estimations.
Source: Towards Health Care. 2025

EFFECT

New consumption patterns emerging

GLP-1 drugs are changing how people spend, with measurable declines across key food and retail categories:

> 5% ↓ Grocery spending within 6 months of GLP-1 treatment.

> 8% ↓ Spending at fast-food chains, coffee shops, limited-service restaurants.

11% ↓ Purchases of calorie-dense, processed items, including savory snacks.

IMPACT

GLP-1 trend spurs growth in metabolic and musculoskeletal product markets

Consumer behavior is shifting rapidly, creating new commercial opportunities.

Lean mass matters: Supplements that support lean body mass (protein, collagen, and calcium) are primed for growth.

Health is the new baseline: Consumers increasingly seek products that support metabolic and musculoskeletal health.

Consumers are shifting toward smaller, nutrient-dense meals: Appetite suppression is increasing demand for meal replacements, and will require nutrient-dense functional snacks that support muscle and bone health .

Beyond food: Partnerships across fitness, telehealth, and nutrition may enable holistic solutions beyond diet alone.

Strategic Positioning
Assessment - Weaknesses

Muscle loss is often hidden, even with visible weight loss.

Weight loss includes the loss of lean mass, not just fat. The fat-free tissue, especially skeletal muscle, supports strength, metabolism, and physical function.

Excessive lean mass loss can lead to:

- Fatigue and weakness
- Reduced neuromuscular performance
- Greater injury risk, and
- Negative emotional or psychological effects.

What influences lean mass loss:

- Lean mass declines with age, especially in women
- Inadequate protein, low physical activity, and rapid weight loss increase lean mass loss.

Concerns about lean mass loss with GLP-1s come from a small subset of data showing higher-than-usual lean mass reduction during rapid weight loss. On average, 60–75% of weight lost with GLP-1s is fat mass, while 25–40% is lean mass, similar to other forms of calorie-restriction weight loss.

Tirzepatide trials show patients lose about 75% fat and 25% lean mass during treatment as shown in *Figure 4*.

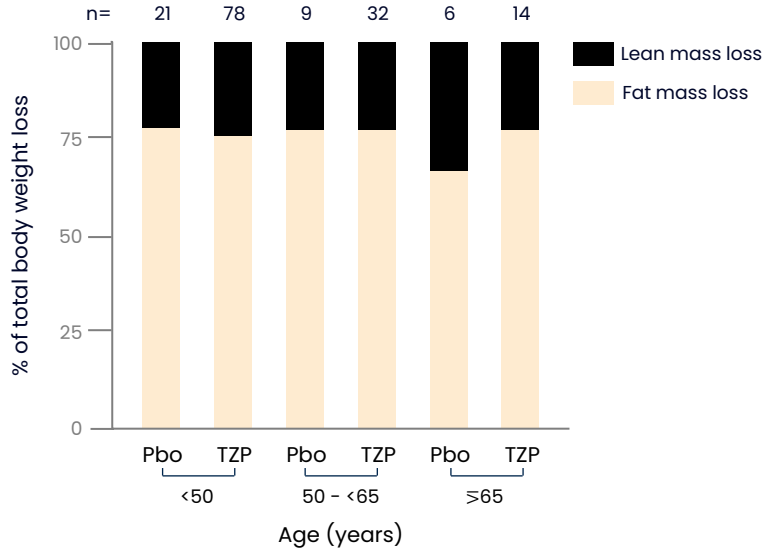


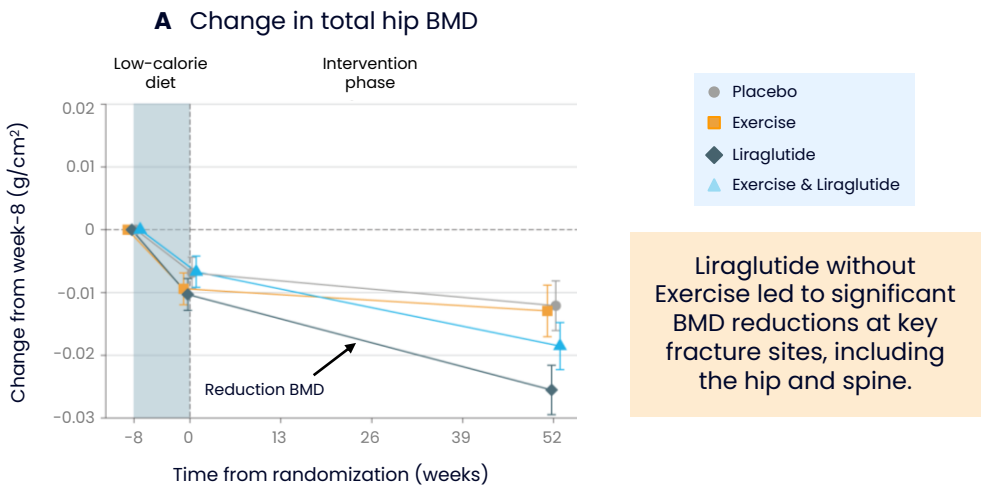
Figure 4. Proportion of body weight reduction by age subgroups at week 72. Data is shown for placebo and pooled tirzepatide 5, 10 and 15 mg groups. Note: n, number of participants with baseline and post baseline data; Pbo, placebo; TZP, pooled 5/10/15 mg tirzepatide.
Source: Look et al. 2025.

For every pound an adult over 60 loses, about 25% is muscle and bone — yet older adults often start with less of both. *Source: AARP.*

Under GLP-1 use, bone loss is even less visible than muscle loss but prevention is within reach.

Weight loss is often linked with reduced bone mineral density, increasing the risk of fractures, particularly in the hip and spine.

A 2024 randomized study evaluated bone health at the hip, spine, and forearm following weight loss through dieting, then a year-long intervention with exercise, liraglutide, or both.



Liraglutide without Exercise led to significant BMD reductions at key fracture sites, including the hip and spine.

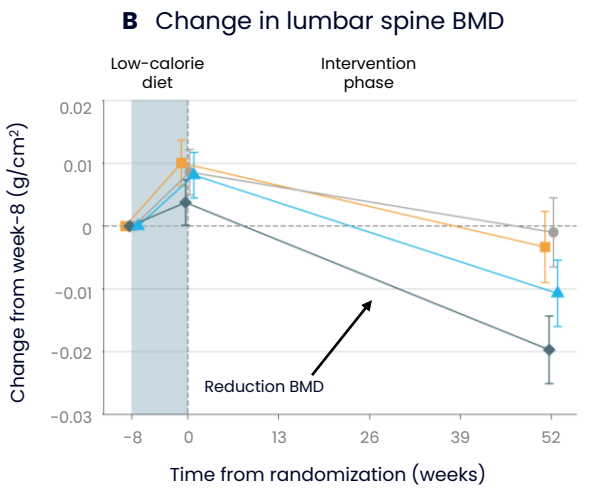


Figure 5. Changes in bone mineral density (BMD) at the total hip (A) and lumbar spine (B). Values are estimated mean changes in BMD after a low-calorie diet (weeks -8 to 0) and 52 weeks after randomization to treatment with placebo, exercise, the GLP-1 agonist receptor (liraglutide), or the combination of Exercise and Liraglutide. The shaded area indicates the period of the low-calorie diet. Results are from the intention-to-treat population (all randomized participants). Randomization was done at week 0, immediately after the low-calorie diet. Error bars are standard errors of the mean. *Source*: *Kjaer Jensen et al. 2024*.

Lack of long-term research on GLP-1's nutritional impacts may lead to flawed assumptions about user needs.

Industry assumption	First principles breakdown	Implications
GLP-1 users need high satiety foods	Many users are already eating less. The challenge is ensuring nutritional quality, not only satiety.	Prioritize nutrient density over further appetite suppression.
Protein solves lean mass loss	Bone mass requires its own nutrient stack. Protein is not enough.	Add calcium, vitamin D, magnesium, and collagen to formulations. Also, behavior change (e.g. resistance training) is needed.
GLP-1 is a weight-loss drug	GLP-1s may influence brain reward pathways, not only hunger signaling.	Address risks of transfer addiction; support mental health and substance use care.
Aiding in the relief of side effects is not relevant at this point	Some users report improvements in mood, while others experience rebound effects like increased cravings or emotional disruption after stopping.	Create opportunities for integrated behavioral health solutions, allowing F&B brands and healthcare providers to collaborate.
Bone health is the only functional need	Their needs are broader, top priorities include cognitive function, energy, and digestion.	Design functional products that support not just bone health, but also cognitive function, sustained energy, and digestive comfort.

Limited research on nutritional deficiencies prevents evidence-based product development, creating uncertainty for healthcare providers and brands. However, today's GLP-1 users are proactive, engaged, and focused on long-term health, not just appetite control.

The opportunity is not to meet them where they are, but to support their long-term goals. To get there, brands must challenge legacy assumptions and design products that reflect the real biology, behaviors, and priorities of modern GLP-1 users.

Traditional snacks, sugary drinks, and convenience foods face declining demand.

Emerging data show that after beginning GLP-1 treatment, users begin reshaping their consumption habits in significant ways.

A national survey conducted by the Agri-Food Analytics Lab at Dalhousie University, in partnership with Caddle, collected responses from 8,662 Canadian adults to examine the real-world impact of GLP-1 drug use on food purchasing and consumption habits.

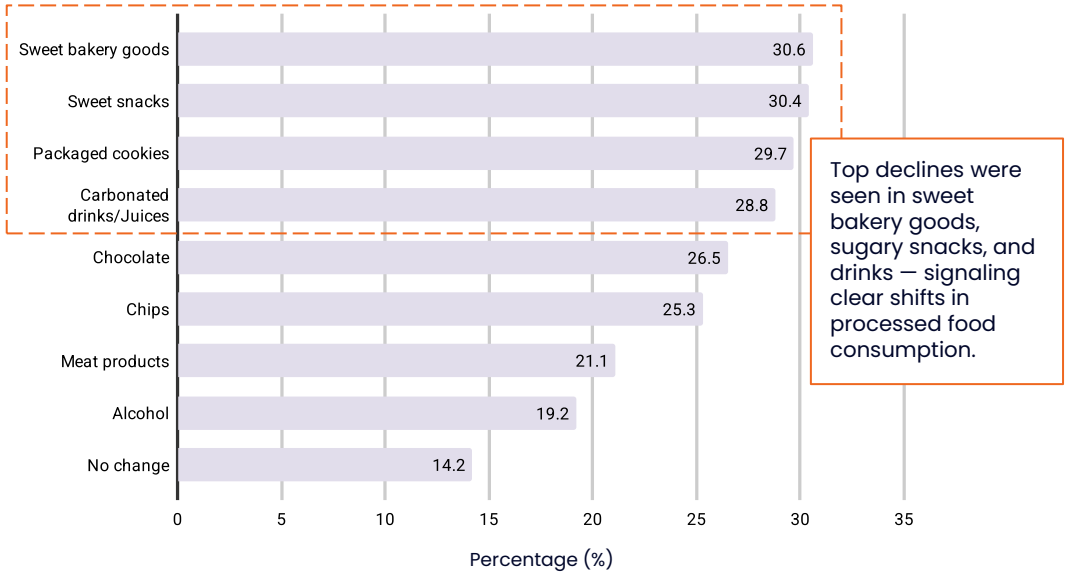


Figure 6. Reduction in F&B purchases after starting GLP-1 treatment. *Source*: *Agri-Food Labs*.

> As the use of GLP-1 drugs like Ozempic increases, we are seeing significant shifts in consumer food choices, particularly a reduction in the intake of sugary and highly processed foods.
>
> This trend has profound implications for the food industry, necessitating innovation and a move towards healthier, low-calorie, and low-carb alternatives.
>
> The industry must adapt to these changing consumer behaviours to meet the growing demand for health-conscious products.

Dr. Sylvain Charlebois

Director, Agri-Food Analytics Lab, Dalhousie University

GLP-1 use may alter perception, reducing product appeal.

GLP-1 receptor agonists modulate central appetite regulation and sensory perception, affecting:

1. GLP-1 is produced in taste cells and its receptors are found on adjacent afferent nerve fibers. Activation of this pathway **enhances taste sensitivity**, especially for sweet and bitter flavors.

2. GLP-1 drugs **reduce the "wanting" and "liking" responses** linked to fatty and sweet food rewards. The shift reflects changes in brain and taste system perception, not just appetite suppression.

3. GLP-1 analogs lower reward center activation in response to high-fat, high-sugar foods, reducing **cravings and habitual consumption patterns**.

GLP-1 users often avoid greasy and sweet foods, along with alcohol and tobacco. These sensory-driven changes challenge brands that rely on habitual consumption, including fast food, desserts, alcohol, and tobacco.


Alcoholic drinks


Soda drinks


Pizza


Fries


Sweet baked goods


Sweet snacks


Salty snacks


Tobacco

GLP-1 drugs are reshaping spending—and putting pressure on F&B revenue models.

A 2025 study of 22,712 U.S. households over 27 months found that GLP-1 users spent 5.5% less on groceries within six months of starting the drug. Among higher-income users, the drop was 8.6%.

The shift places pressure on the beverage sector. Brands focused on soft drinks, juices, energy products, and alcohol may need to rethink their strategies.

Similar patterns are emerging in snacks and convenience foods.

Category	Average Annual Impact (%)	*Approx. Annual Dollar change/household($)
Soft drinks	-7	-50
Juices	-4	-28
Coffee & Energy drinks	-4	-28
Alcohol	-1.4	-10.50
Water	-0.5	-9

*Estimated based on an average monthly grocery spend of approximately $630, considering 5.5% reduction in grocery spending.

Soft drinks face the greatest impact—down 7%, or approximately $50 per household annually

GLP-1 drugs may alter reward pathways, lower alcohol intake, and pose revenue risks for the alcohol industry.

The bottom line for brands: When people spend less, volume shrinks and margins get squeezed. As GLP-1 adoption grows, the effects could ripple across the F&B industry, extending to retailers and business models built on high consumption (e.g., warehouse clubs and fast food chains).

Strategic Positioning
Assessment - Threats

Emerging concerns, ranging from media-driven fear over side effects to off-label use and regulatory probes, pose growing threats to public confidence in GLP-1 therapies.

Threat	Source of concern	Implication
Media attention on side effects	Reports on elevated risk of pancreatitis, bowel obstruction, gastroparesis, and non-significant rise in biliary disease among GLP-1 users.	May erode consumer trust and reduce adoption rates.
Media reports on rare adverse events	Coverage of rare eye conditions, such as NAION, potentially linked to GLP-1 RAs.	May prompt additional safety reviews and cause patient hesitancy.
Off-label interest in addiction treatment	Preliminary studies and anecdotal reports suggest GLP-1 RAs may reduce cravings for substances like alcohol and nicotine by modulating brain reward pathways. These early-stage findings have drawn attention amid rising demand for pharmacologic addiction therapies.	Raises ethical and regulatory concerns; may increase scrutiny over off-label use and potential misuse.
Concerns over muscle mass loss (sarcopenia)	Weight loss on GLP-1s is sometimes accompanied by muscle loss, reducing strength, stamina, and metabolic rate.	May prompt monitoring programs and co-intervention strategies (e.g., resistance training, protein intake).
Skeletal health risks	GLP-1 therapy has been linked to reduced bone mineral density at the hip and spine.	May require long-term bone health monitoring and patient risk stratification.
Regulatory investigation into suicidality	In July 2023, the European Medicines Agency's PRAC launched a safety review into suicidal thoughts and self-harm potentially associated with GLP-1 RAs, following consumer reports.	May result in updated warnings, revised usage restrictions, or new risk–benefit assessments by regulators.

GLP-1 market evolution brings promise and pressure.

2026 **2029**

SHORT TERM
2025

MID-TERM
2027

LONG TERM
+2030

Opportunities ahead

- Surge in protein/functional F&B.
- Increased demand for bone health products, cognitive/brain health, energy support, digestive health.
- Coverage debates may emerge among employers and payers.

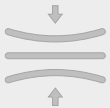
- Rise of addiction-related use cases.
- Revenue compression in alcohol and tobacco sectors.
- Market entry of next-generation oral GLP-1 receptor agonists, enhancing patient adherence and expanding the user base due to improved convenience over injectable versions.

- FDA policy shifts and broader insurance expansion.
- Emergence of GLP-1 companion ecosystems, including telehealth, nutrition, and fitness integrations.
- If next-generation appetite-suppressing therapies like BRINP2-related peptide (BRP) prove safe and effective, they could offer an alternative to GLP-1 drugs by reducing appetite with fewer side effects.

External pressures

- In the U.S., Medicaid and Medicare currently cover GLP-1 prescriptions for diabetes treatment. However, coverage does not currently extend to weight loss treatment.

- Historical precedents suggest the alcohol and tobacco industries may engage in lobbying to delay or block expanded regulatory approvals for addiction-related indications.



- If future clinical trials validate their role in treating substance use disorders, federal and private payers may re-evaluate eligibility guidelines.

Industry-specific **Opportunities**

A snapshot of unmet needs, strategic responses, and companies leading the shift in the GLP-1 era.

	Theme	Current needs	Strategic implications	Examples of current solutions
Behavioral and Therapeutic Disruption	**Addiction Treatment Potential**	GLP-1 drugs reduce cravings for alcohol and nicotine by modulating neural reward pathways.	Opens a pathway for repositioning GLP-1s in addiction care, impacting related industries.	No available solutions yet. But there are clinical trials on alcohol and smoking cessation using semaglutide and exenatide.
	Mental Health and Behavioral Support	GLP-1 users report improved mood, though some experience anxiety or compulsive behaviors after discontinuation.	Integrated behavioral health solutions are needed to support mental wellness during and after treatment.	Wisp + Nourish partnership for mental and nutritional care.
	Functional Beverage Growth	Alcohol consumption drops significantly among GLP-1 users.	Creates opportunities for non-alcoholic, mood-enhancing, and wellness-oriented beverages.	Collider Unwind and Three Spirit Livener.
	Nicotine Replacement Alternatives	GLP-1 use is associated with declines in tobacco and vape product use among some users	Tobacco industry may need to shift into wellness or non-nicotine products.	Cigtrus and HealthVape vitamin inhalers.
	Fitness and Wellness Market	Strength training mitigates GLP-1-induced muscle loss.	Programs must integrate fitness, recovery, and nutrition to preserve long-term health.	Noom + FitOn Muscle Defense, Equinox GLP-1 protocol.
Nutritional & Lifestyle Innovation	**Lean Mass and Bone Health**	GLP-1 users lose both fat and muscle; long-term muscle loss risks include reduced strength and metabolic function.	Products and programs must address both muscle and bone loss, integrating protein and micronutrients like calcium, D, and magnesium.	Protein blends, calcium-rich functional foods, resistance training programs.
	Nutritional Product Innovation	GLP-1 reduces appetite; users shift to smaller, nutrient-dense meals.	F&B brands must adapt with fortified, low-volume, high-density products tailored to user needs.	Vital Pursuit by Nestle, Herbalife Nutrition Companion, Whole Health Support Nutrient Powder.
	Strategic Gaps and Misinformed Assumptions	Legacy industry assumptions often conflict with user biology and evolving needs.	Innovation must be rooted in emerging evidence, not traditional diet paradigms.	Shift from satiety-only focus to nutrient preservation and whole-body health.

Behavioral and Therapeutic Disruption

GLP-1 drugs may redefine their role beyond diabetes and obesity.

The therapeutic potential of GLP-1 is expanding beyond metabolism opening the door to entirely new treatment categories.

STRATEGIC IMPLICATION

Clinical trials exploring GLP-1 drugs for addiction (alcohol, smoking), neurodegenerative diseases (Alzheimer's), and kidney disease open entirely new markets.

Emerging potential in substance use disorders
Early studies show GLP-1 drugs may reduce alcohol, tobacco, and opioid use disorders by influencing reward pathways in the brain.

How they affect brain activity
GLP-1 drugs have been shown in some studies to influence neuronal activity, including modulating regions linked to reward, stress, and compulsive behaviors. This effect helps to regulate behaviors linked to addiction, stress, and compulsive eating.

Why GLP-1 expression matters
GLP-1 is active in brain regions involved in reward and motivation. This overlap with addiction pathways helps explain its emerging use in substance abuse, especially where obesity and addiction share similar brain responses.

Promise in neurodegenerative diseases
GLP-1 drugs may reduce brain inflammation, improve insulin sensitivity, and modulate amyloid and tau toxicity. They are being investigated for their role in preserving neural communication and glucose metabolism in the brain.

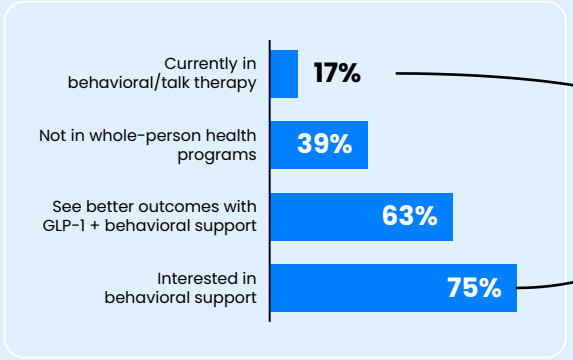
Early evidence
In a Phase 2b trial, liraglutide slowed brain volume loss by up to 50% and reduced cognitive decline by 18% over 12 months.

Cardiovascular and kidney outcomes
GLP-1 drugs are linked to lower risks of mortality, major cardiovascular events, and major adverse kidney events in type 2 diabetes patients.

As GLP-1 research progresses and the extent of clinical evidence grows, new therapeutic uses may reshape treatment pathways across multiple disease areas.

For many GLP-1 users, mental health struggles and weight management are closely linked.

Some GLP-1 users report improved mood, while others experience increased anxiety or compulsive behaviors after discontinuing treatment.



No one-size-fits-all: GLP-1 users have different behavioral needs
Most users see health gains, but many still face emotional challenges, and few are accessing behavioral support.

Figure: Study based on a survey of 300 GLP-1 users.
Source: EverNorth health services 2025.

STRATEGIC IMPLICATION

This opens the door for integrated behavioral health solutions. Food, beverage, and healthcare brands can collaborate on offerings that support both physical and mental well-being.

48%
of former GLP-1 users

29%
of current GLP-1 users

Reported worse mental health over the past year, which highlights the need for ongoing behavioral care, even after treatment ends.

GLP-1 users face a range of behavioral health needs, with stress, anxiety, depression, and compulsive behaviors differing by age, gender, and treatment status.

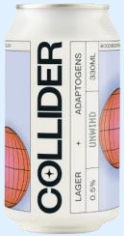
Declining alcohol intake among GLP-1 users opens product opportunities.

As GLP-1 drugs reduce alcohol consumption, the beverage industry should respond by introducing functional, non-alcoholic alternatives.

STRATEGIC IMPLICATION

Beverage brands can capitalize on this shift by offering functional, alcohol-free options positioned to support hydration, digestive comfort, and mood balance.

Alcohol-free drinks designed for functional support



Collider Unwind Blend

Collider nootropic drinks are alcohol-free beverages brewed in the style of beer.

The beer has been infused with functional mushrooms (Lion's mane) and botanicals (L-theanine from tea and ashwagandha root) marketed to enhance mood.

The formulation is also claimed to reduce cortisol and support serotonin balance.

Three Spirit Livener

Three Spirit Livener is a non-alcoholic beverage made from plant-based ingredients, intended as an alternative to alcohol with energizing effects.

It contains guayusa for caffeine, schisandra berries for stress adaptation, and ginger for digestion, along with ginseng and apple cider vinegar.

Its primary function is stimulation rather than intoxication.

Decreased alcohol consumption among GLP-1 users could impact alcohol sales, as 33% of habitually heavy drinkers reduced their alcohol intake.

GLP-1 disrupts nicotine use pressuring industry response.

As tobacco and nicotine use declines among GLP-1 users, traditional products face disruption, creating pressure to identify and pursue alternative market opportunities.

STRATEGIC IMPLICATION

Tobacco companies may need to accelerate investment in non-nicotine wellness products, functional beverages, or other adjacent categories to counteract declining nicotine demand.

Products offering inhalation support without nicotine

Cigtrus
(Plant-based vaping)

Cigtrus is a nicotine-free inhaler designed to help with smoking cessation.

It delivers essential oils through a breathable filter, providing an alternative to tobacco and nicotine vaping.

The device is non-electric and smokeless. It addresses habitual hand-to-mouth motions associated with smoking, while promoting relaxation.

HealthVape
(Vitamin-infused vaping)

HealthVape offers nicotine-free inhalers vitamins B12, C, A, and D, along with amino acids and plant extracts. The products are marketed as supporting wellness areas like immunity, increase energy, relaxation, and sleep.

The company claims that nicotine-free inhalers may help GLP-1 users manage symptoms like fatigue, poor sleep, and low mood during treatment.

Among GLP-1 users, weekly cigarette use dropped from 40% to 24%, and e-cigarette use declined from 30% to 16% after starting treatment.

Strategic partnerships can close care gaps for GLP-1 users.

While GLP-1s target physiological change, coordinated care models that include behavioral, nutritional, and emotional support may enhance long-term well-being.

STRATEGIC IMPLICATION

Integrated solutions may support GLP-1 users through scalable, cost-effective care models, offering real-time insights, behavioral coaching, and individualized guidance that complement treatment.

Example of a recent partnership

wisp Nourish

Women's health telehealth provider Wisp has partnered with Nourish to offer comprehensive nutrition counseling services to patients using GLP-1 medications as part of their weight management program.

Patients can access nutrition counseling through insurance or a discounted self-pay rate.

Why this matters for GLP-1 users

- Addresses common challenges (e.g., nutrient intake and dietary shifts)
- Supports sustained behavior change through personalized guidance.
- Expands Wisp's weight care program beyond prescriptions.

Nutritional & Lifestyle Innovation

Nutrition products positioned for appetite and metabolic support

The F&B and supplement industries have clear opportunities to address lean body mass loss and nutrient deficiencies with targeted formulations.

STRATEGIC IMPLICATION

Positioning products as part of a broader longevity and metabolic health solution rather than a narrow focus on weight loss.

Example products marketed for GLP-1 users

Vital Pursuit by Nestle

Nestlé Health Science has positioned Vital Pursuit as a food line rich in protein, iron, vitamin A, potassium, and other essential nutrients.

Nestle is also developing innovative nutrient profiling with AI to support bone health.

GLP-1 Nutrition Companion by Herbalife

Herbalife nutrition introduced a line of protein shakes and drinks designed for GLP-1 users.

The product includes Formula 1 healthy meal nutritional shake mix, Protein drink mix, and Active fiber complex.

Click here for a more in-depth look at these products

Nutrition products positioned for appetite and metabolic support

The F&B and supplement industries have clear opportunities to address lean body mass loss and nutrient deficiencies with targeted formulations.

STRATEGIC IMPLICATION

Positioning products as part of a broader longevity and metabolic health solution rather than a narrow focus on weight loss.

Example products marketed for GLP-1 users

GLP-1 Support Nutrient Powder by Whole Health

Whole Health has developed dietitian-formulated supplements to support users of GLP-1 medications.

The line offers products that include enriched multivitamins for women and men, synbiotic, fiber, nutrient, and protein powders.

Nextida GC by Rousselot

Nextida GC is a collagen peptide supplement specifically formulated to reduce post-meal blood glucose spikes. Nextida GC stimulates the body's own production of GLP-1 by increasing insulin secretion, slowing gastric emptying, enhancing satiety, and reducing post-meal glucose spikes. It may also help reduce craving, mood swings, and fatigue.

Click here for a more in-depth look at these products

F&B innovation should cater to different GLP-1-driven eating patterns.

GLP-1-induced appetite suppression is reshaping consumer eating habits, reducing portion sizes and increasing demand for nutrient-dense foods. This shift creates whitespace for innovation in product formats, packaging, and nutritional profiles.

STRATEGIC IMPLICATION

F&B brands must prioritize personalization, as GLP-1 users' needs vary by lifestyle, preferences, and health goals.

Example products with potential to support GLP-1 users

Multi GLP-1 Support by Youtheory

Multi was developed with obesity expert Dr. Louis Aronne, this supplement is designed to help fill common micronutrient gaps that may arise with reduced food intake during GLP-1 use or calorie restriction.

The formulation includes B vitamins, iron, vitamin D, and other micronutrients commonly associated with energy metabolism, bone health, and immune support.

Sensoril® by Kerry

Sensoril® is a branded, standardized extract of ashwagandha, derived from both the root and leaf of the plant.

The formulation is marketed as being designed to support stress reduction, sleep quality, energy balance, and cognitive function.

Click here for a more in-depth look at these products

Flavor adaptation and new product formats for GLP-1 needs are another area for innovation.

Sweet vs savory preferences

While some consumers prefer sweet options, a growing segment is leaning toward savory, with an emphasis on balance and future health goals.

At-home eating

As consumers increasingly eat at home, brands have an opportunity to design products catering to home-based eating, balancing convenience with nutritional value.

On-the-go formats

For convenience, fortified, single-serve formats will cater to busy GLP-1 users.

Examples of flavors and product formats

Flavor adaptation

Tastesense ™ Sweet

A flavoring system designed to reduce added sugar content in foods and beverages by up to 30%, while maintaining sweetness and mouthfeel. It supports clean-label formulation and sensory quality.

Tastesense ™ Salt

Marketed as a formulation that reduces sodium by up to 60% without sacrificing flavor. It is claimed to maintain salt perception, mask bitter notes, and suit clean-label applications.

At-home eating

Healthy choice, GLP-1 Friendly Meals

A range of high-protein, pre-portioned frozen meals positioned for individuals with reduced appetite.

These meals are positioned for GLP-1 users, but no publicly available clinical data specific to GLP-1 use has been identified.

On-the-go formats

ProtiFit, GLP-1 protein bars

These bars provide high protein, moderate calories, and low sugar, and are positioned for portion control.

They are marketed toward GLP-1 users, but no publicly available clinical data specific to GLP-1 use has been identified.

Supporting side effect management may aid GLP-1 user experience

GLP-1 users experience nausea, digestive discomfort, and micronutrient deficiencies. These symptoms often appear during dose escalation and may affect adherence.

STRATEGIC IMPLICATION

Food, beverage, and supplement brands can support sustained GLP-1 use by repurposing existing products. There are options to develop products that address digestive and hydration, related challenges.

Example products relevant to common GLP-1 side effects

Biocare for relieving gastrointestinal symptoms

Biocare Beverage is positioned to support digestive health in individuals using GLP-1 receptor agonists. It contains GutGard® (licorice extract) and PepZin GI® (zinc-carnosine), which have been studied for gastrointestinal support in non-GLP-1 populations.

The product also contains fiber, enzymes, and probiotics that may aid digestion and help manage side effects like bloating or constipation.

LMNT electrolytes for hydration support

LMNT is a zero-sugar electrolyte drink mix. While formulated for hydration support in low-carb diets, it is sometimes used by individuals seeking to manage fluid loss. LMNT may be relevant for those using GLP-1 medications who experience dehydration-related symptoms.

This product has not been evaluated in GLP-1 users, and its impact on medication side effects such as nausea or constipation is unproven.

***50%** of GLP-1 users report feeling nauseous, **30%** complain of constipation.*

Fitness and wellness market expansion targeting muscle loss and improved metabolism.

GLP-1 users are advised to incorporate strength training to preserve lean mass and bone density, presenting an opportunity for sports nutrition and fitness brands.

STRATEGIC IMPLICATION

Fitness and wellness brands can respond to GLP-1-driven demand by offering targeted strength programs and products that support muscle preservation and long-term metabolic health.

Examples of fitness and wellness products

NOOM

Noom's GLP-1 companion with muscle defense

Noom, a digital healthcare company, partnered with FitOn to enhance its GLP-1 Companion program with a feature called Muscle Defense.

The initiative addresses a growing concern among GLP-1 users, loss of muscle mass and bone health.

Designed under medical guidance, the program combines fitness content from FitOn with Noom's nutrition tools to help users maintain lean muscle, support metabolic health, and reduce the risk of complications such as sarcopenic obesity.

EQUINOX

Equinox GLP-1 protocol

Equinox has introduced a GLP-1 protocol designed to preserve muscle mass and improve body composition during medication-assisted weight loss.

Through personalized assessments, certified coaches create tailored plans that integrate movement, nutrition, and recovery, aligning with each client's goals, habits, and fitness level.

The program emphasizes long-term behavior change and metabolic health, helping individuals maintain weight loss and physical performance even after discontinuing GLP-1 use.

~67%

of GLP-1 users* now prioritize the following needs, with growing emphasis on metabolic and overall health

- Brain-cognitive health
- Energy support
- Digestion - gut health
- Cardiovascular health
- Heart health
- Immunity - immune support
- Alertness and focus

This signals strong demand for multifunctional solutions that go beyond appetite control.

*users are represented by 2642 responses provided by participants in the study Adapting appetites.

GLP-1 users are redefining health priorities

Here's how industry must respond

The strategic playbook offers a roadmap for action.

- Reposition for behavioral modulation, not just appetite suppression
- Build for nutrient preservation (muscle + bone) over hunger
- Partner across F&B, health tech, and telehealth to build GLP-1 ecosystems
- Prepare for downstream disruption in alcohol, tobacco, and indulgent food sectors
- Watch for policy tailwinds in addiction, neuro, and preventive health

Is your business ready to adapt?

The questions shaping what comes next

How will reduced alcohol and nicotine use affect consumer purchasing behavior across food, beverage, and supplement industries?

Will companies in the alcohol and nicotine industries attempt to counteract or adapt to the declining use of their products?

What new product categories could emerge as social and recreational alternatives to alcohol and tobacco?

If GLP-1s become a viable treatment for addiction, how will public health policy and insurance reimbursement change?

Could GLP-1 medications drive a broader consumer shift toward wellness-focused consumption habits?

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About PreScouter

PRESCOUTER PROVIDES CUSTOMIZED RESEARCH AND ANALYSIS

PreScouter helps clients gain competitive advantage by providing customized global research. We act as an extension to your in-house research and business data teams to provide you with a holistic view of trends, technologies, and markets.

Our model leverages a network of 4,000+ advanced degree researchers, industrial experts, engineers, and analysts across the globe to tap into information from small businesses, national labs, markets, universities, patents, startups, and entrepreneurs.

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Privileged Information: PreScouter interviews innovators to uncover emerging trends and non-public information.

Customized Insights: PreScouter finds and makes sense of technology and market information to help you make informed decisions.

Research Focus Areas

TECHNOLOGY & COMPANY LANDSCAPES

Understand current technologies or products within a space of interest.

IP INVESTIGATION / LANDSCAPE

Uncover key IP or have PreScouter conduct a Landscape to help you understand any gaps in the space.

EARLY WARNING SYSTEM

Monitor a particular area for an early warning on any new product launches, innovations, and promising technologies.

SUPPLIER IDENTIFICATION

Find alternative suppliers for existing parts or materials, or find new ones in new regions or fields.

SAMPLE PROCUREMENT

Procure samples of products of interest anonymously via PreScouter.

COMPETITIVE INTELLIGENCE

Analyze competitor products, strategy and goals through primary and secondary research.

EXPERT INTERVIEWS

Leverage Industry or Academic Experts to answer key ongoing challenges or probe new topics.

PARTNER VETTING / DUE DILIGENCE

Perform due diligence on a potential partner or target, allowing for an unbiased review.

MARKET TRENDS, ANALYSIS & SIZING

Understand a market size, segmentation, key players, drivers and growth.

WHITE PAPERS

Customized white papers developed around a specific market or product area.

WORKSHOPS

Help your team get up to speed on pressing topics such as regulatory changes, best practices or new tools.

GENERATIVE AI SYSTEMS DEVELOPMENT

Leverage PreScouter to develop custom AI software to monitor regulations, develop technical know-how, query repositories, etc.

VOC OR SURVEY STUDIES

Understand key unmet needs or perception of key groups towards a product or service (real or future).

DASHBOARDS & DATA ANALYTICS PLATFORM

Visualize data gathered over the course of projects in an easy-to-use custom data analytics platform or dashboard.

REGULATORY LANDSCAPES

Understand the impact of regulatory changes, potential upcoming rulings, explore unknown regulation in a new field or geography.

Appendix

This appendix highlights select food, beverage, and wellness products designed to address needs emerging in the GLP-1 era. These examples reflect trends in functional nutrition, behavioral support, muscle and bone health, and alternatives to traditional indulgence categories.

While not endorsements, they represent early signals of how brands are adapting to shifts in consumer biology, behavior, and buying patterns.

Vital Pursuit - Nestlé

SUMMARY

Source

Meals are offered with varied ingredients, including meat and vegetarian options, to accommodate diverse dietary preferences

Marketed Benefits

According to the brand:

- The meals are designed for GLP-1 users due to their portion size, high protein content, and inclusion of key nutrients.
- Ingredients are claimed to help reduce appetite, preserve muscle mass, and maintain nutritional balance

⚠ *Note: These claims are not supported by product-specific clinical evidence.*

Vital Pursuit - Nestlé is a food line positioned for individuals using GLP-1 medications or managing their weight.

Vital pursuit portions are enriched with:

- 22 g of protein
- Vitamin A
- Calcium
- Iron
- Potassium

Source: Vital Pursuit.

The relevance for GLP-1 users

Vital Pursuit markets its products as aligned with general dietary recommendations for GLP-1 users, emphasizing higher protein and essential micronutrients.

Some products also contain fiber and are portioned to accommodate reduced appetite.

Product formats include options such as pizzas, sandwiches, and bowls.

There is no clinical evidence specific to Vital Pursuit products. Their formulation reflects general dietary guidance for GLP-1 users but has not been evaluated in studies for efficacy in this population.

GLP-1 Nutrition Companion - Herbalife

SUMMARY

Source

Soy protein isolate, calcium caseinate, and casein

Marketed Benefits

According to the brand:

- Protein support to help build muscle tissue and maintain lean muscle mass.
- Support overall health and help protect the body from free radical damage.
- Promote regularity and a healthy digestive system.
- Low-glycemic, suitable for diabetics, vegetarians, and gluten-free diets.

⚠ *Note: These claims are provided by the brand and are not supported by clinical evidence in GLP-1 users.*

Herbalife

GLP-1 Nutrition Companion - Herbalife markets this combination of products as suitable for individuals using GLP-1 medications or undergoing medically supervised weight loss.

GLP-1 nutrition companion contains:

- 24 g of soy protein isolate, calcium caseinate, and casein
- 21 vitamins, minerals and antioxidants.

Source: Herbalife.

The relevance for GLP-1 users

Each serving contains 24 grams of protein and 21 vitamins, minerals, and antioxidants.

Its composition reflects general nutritional principles relevant to GLP-1 medication use, including adequate protein and micronutrient intake.

It also includes 6 grams of fiber and is formulated to be low-glycemic, gluten-free, and suitable for diabetics and vegetarians.

GLP-1 Nutrition Companion has not undergone clinical evaluation in individuals using GLP-1 medications. Herbalife recommends consulting a physician before making dietary changes during medically supervised weight loss.

GLP-1 Support Nutrient Powder

SUMMARY

Source

Whey protein isolated

Marketed Benefits

According to the brand:

- Created to fill nutritional gaps while on GLP-1 medications.
- Supports digestive, immune, and metabolic health
- Non-GMO and gluten- and soy-free diets.

⚠ *Note: These claims are provided by the brand and are not supported by clinical evidence in GLP-1 users.*

THE VITAMIN SHOPPE

GLP-1 Support Nutrient Powder is marketed as a meal replacement product for individuals using GLP-1 medications or following a weight management plan. It should be noted that this a newly launched product and not a rebrand of an existing item as seen with Herbalife.

GLP-1 nutrition companion contains:

- 25 g of whey protein isolate
- 24 vitamins, minerals and antioxidants
- Fiber and DIgezyme
- TruServ Organic Greens Blend,

Source: The Vitamin Shoppe.

The relevance for GLP-1 users

The product contains nutrients that reflect dietary recommendations often relevant for individuals using GLP-1 medications, such as high protein content to support muscle maintenance.

It includes fiber, digestive enzymes, and a greens blend to support general digestion and satiety, aligning with nutritional needs during reduced food intake.

While the formulation of GLP-1 support nutrient powder is based on established nutritional principles, its specific impact on GLP-1 users has not been clinically validated.

Multi GLP-1 Support

SUMMARY

Source

Collagen, protein, and micronutrients

Marketed Benefits

According to the brand:

- Replenishes deficiencies that can result from a calorie deficit.
- Provide nutrients to combat low energy.

⚠ *Note: These claims are provided by the brand and are not supported by clinical evidence in GLP-1 users.*

Multi GLP-1 Support is marketed to address micronutrient gaps that may arise from reduced food intake, including in individuals using GLP-1 medications. Developed in collaboration with Dr. Louis Aronne, MD, FACP, a leading expert in obesity and GLP-1 therapy, this formulation is positioned to support individuals on GLP-1 medications or calorie-restricted diets by addressing nutrient gaps commonly associated with weight loss.

The formulation includes B vitamins, iron, vitamin D, and other micronutrients associated with energy metabolism, bone health, and immune support.

The relevance for GLP-1 users

- Appetite suppression from GLP-1 drugs can lead to reduced intake of essential nutrients.
- Micronutrient supplementation may be considered to support nutritional adequacy during active weight loss.
- This product uses forms of nutrients described by the manufacturer as more easily tolerated.
- Includes micronutrients often monitored in individuals with prolonged caloric restriction.

Source: GNC Live Well.

Some ingredients in this product are supported by individual studies, but the full formulation has not been clinically evaluated for effectiveness in individuals taking GLP-1 medications.

Sensoril®

SUMMARY

Source

Ashwagandha (Withania somnifera)

Marketed Benefits

According to the brand:

- Reduces stress and anxiety
- Improves sleep
- Supports cognitive performance.

Additional features

- Made from root and leaf of the ashwagandha plant which offers a broader spectrum of bioactive compounds.
- Highly soluble and stable over time.

⚠ *Sensoril is clinically studied in the general population for stress-related outcomes. It has not been evaluated in individuals using GLP-1 medications.*

KERRY

Sensoril® is a branded, standardized extract of ashwagandha (*Withania somnifera*), derived from both the root and leaf of the plant. The formulation is designed to support stress reduction, sleep quality, energy balance, and cognitive function.
It is water-soluble, low in root fiber, and suitable for use in supplements, foods, and beverages.

The relevance for GLP-1 users

Sensoril has demonstrated effects on stress, sleep, and cognitive measures in non-GLP-1 users. It has not been clinically tested in individuals taking GLP-1 medications.

A double-blind, randomized, placebo-controlled trial involving 98 chronically stressed adults found that 125 mg of Sensoril daily resulted in:

- 62% reduction in stress, measured by the modified Hamilton Anxiety Rating Scale (mHAM-A) ($p < 0.001$),
- Significant reductions in cortisol and CRP levels, two biomarkers of stress and inflammation ($p < 0.05$ and $p < 0.001$, respectively)

Source: Kerry.

These findings are based on studies in non-GLP-1 users. The ingredient has not been clinically evaluated for use in individuals taking GLP-1 medications.

Nextida GC

SUMMARY

Source

Collagen peptide derived from animal materials (bovine, porcine, and fish).

Marketed Benefits

Reduce post-meal blood glucose spikes.

Additional features

Nextida GC stimulates the body's own production of GLP-1, a hormone that regulates blood sugar by:

- Increasing insulin secretion
- Slowing gastric emptying
- Enhancing satiety

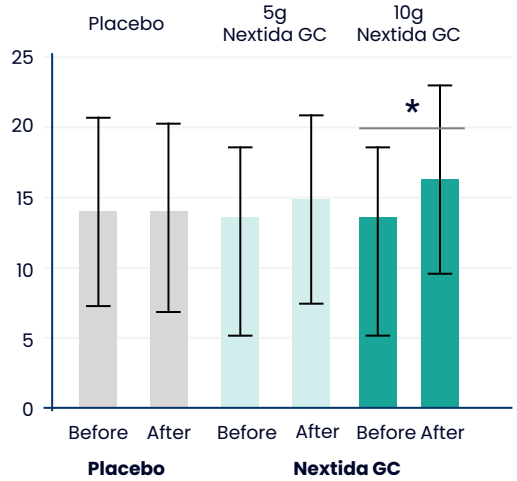
Rousselot

Nextida GC, developed by Rousselot, is a collagen peptide supplement specifically formulated to reduce post-meal blood glucose spikes. Its proposed effects may be relevant for individuals managing their weight, metabolic health, or blood sugar levels.

Relevance to Metabolic Health and Appetite

- In a study of non-GLP-1 users, Nextida GC was associated with increased GLP-1 levels and reduced post-meal glucose spikes. The brand also markets potential benefits for satiety, energy, and cravings, though these have not been evaluated in GLP-1 users.

Source: Rousselot.



Nextida GC significantly increased total GLP-1 levels in normoglycemic and prediabetic individuals at a 10 g dose, with a noticeable upward trend also seen at 5 g. (*p< 0.05). *Source: Grasset et al. 2024, Nextida GC.*

PRESCOUTER

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