



Where Are They Now?

Insights from Anti-Obesity Medication Users Past and Present

The prevalence of anti-obesity medications (AOMs), such as GLP-1 receptor agonists, continues to disrupt the global food and beverage industry, presenting opportunities for product line expansions and new introductions. According to the IQVIA Institute for Human Data Science, GLP-1 spending in 2029 is projected to approach \$200 billion, driven increasingly by weight management needs.

While a growing number of people turn to AOMs to support their weight management goals or to improve other health conditions, many are also deciding to transition off the medications. New proprietary ADM Outside VoiceSM research examines the current GLP-1 usage landscape within five countries (US, UK, France, Germany, Spain), investigating the two distinct consumer segments and uncovering their unique motivations and desires for supportive food, beverage and dietary supplement solutions.



Current GLP-1 Medication Users

Motivations for Continuing Use

Almost all current users (91%) across the countries surveyed state they are satisfied with their weight management progress while on GLP-1s. Their success on the medications is clear and compelling, with over a third (35%) of users planning to continue taking GLP-1s as part of their long-term health management strategy.

Weight management/loss (62%) was the primary reason people initially started taking AOMs. Similarly, the top reason consumers continue taking GLP-1 medications is that they “have not yet reached target weight/health goals.” Closely behind is a desire to “maintain the positive changes in my eating habits.”

A Willingness to Invest

Over 90% of current GLP-1 users say they are willing to make lifestyle changes to support their treatment. This is significant, indicating that the vast majority of users find value in AOMs, and they are open to changing their habits to increase beneficial outcomes. This includes revisiting their food and beverage choices, creating substantial opportunity for brands to innovate with the GLP-1 user in mind.

Product Attributes Piquing Interest

With 74% of AOM users stating they feel full more quickly, it's no wonder 73% say portion control is more important now than before GLP-1s. And 69% of AOM users say nutritional value is now more important to them, so they're paying closer attention to aspects like added sugar content (64%), calories (60%), total carbohydrates (56%), protein content (55%) and fiber content (55%).



Strong Demand for Added Support:

80% of consumers taking AOMs are willing to pay more for food and beverage products that provide added health benefits, and 67% note that GLP-1 friendly attributes are now more important to them.



Ongoing Opportunities with Biotics:

Nearly 4 in 10 people (37%) taking GLP-1s have intentionally increased their consumption of pre-/probiotics, which might be related to a common user concern for gastrointestinal discomfort.

Consumers Transitioning Off GLP-1 Medications

Rationale for Stopping Usage

Previous users generally had a positive experience with AOMs, with nearly 70% agreeing the medication was effective in helping them reach their health objectives. This is reflected in the number one reason adults across all countries stopped taking GLP-1s: they reached their target weight/health goals (36%).

However, practical issues such as unmanageable side effects (26%) – including digestive discomfort, lack of hydration and feeling weak – and medication cost (23%) were the next two explanations for transitioning off the medication.

Weight Regain Despite Positive Habits

Many consumers no longer taking GLP-1s say they have maintained positive habits, such as eating more fruits/vegetables (54%), having better portion control (49%), cooking more meals at home (47%) and increasing protein (33%) and fiber intake (32%).

Despite these healthy habits, 76% of adults have regained at least some of the weight they lost.

The Return of Food Noise

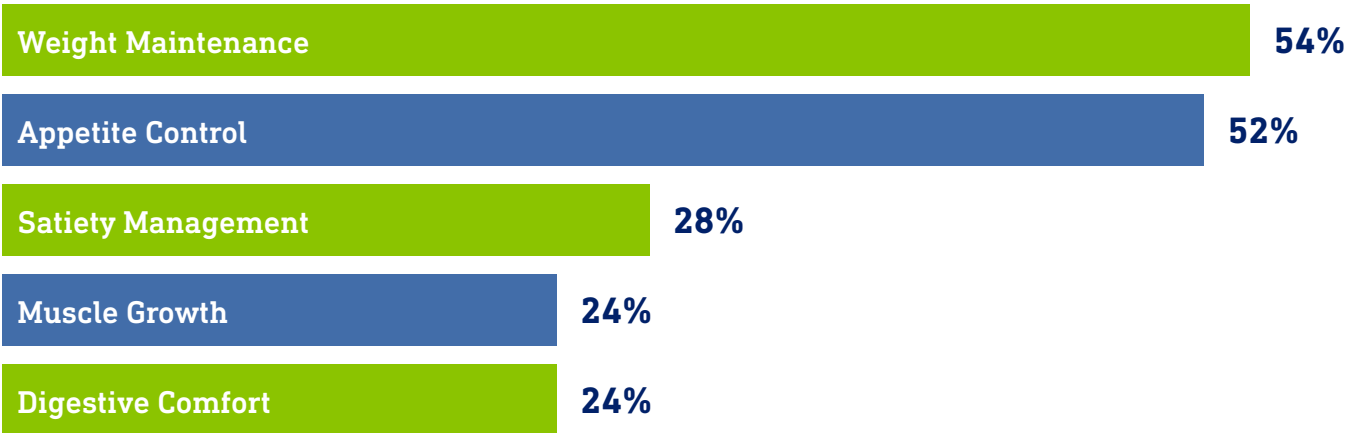
The effects of the medication are clear once it's gone, with 60% of former users globally agreeing their thoughts about food and cravings (also known as 'food noise') have returned since discontinuing the medications. Potentially connected to the desire to suppress food noise, two-thirds (65%) say they would consider restarting GLP-1s.

Focus on Support and Maintenance

Throughout the weight management journey, consumers taking AOMs (86% of current users and 76% of previous users) consult with their doctors or healthcare professionals. As they decide to discontinue usage, many of these consumer still seek support and wish to maintain their progress.



In which of the following areas, if any, do you need the most support in managing/maintaining since stopping GLP-1s?



The prevalence of AOMs in the minds' of today's consumers is considerable. For those continuing on their wellness journeys with AOMs, they now view the medications as a part of their holistic health strategy, combining them with lifestyle modifications and clear, goal-oriented outcomes. While there is also a prominent group of consumers stopping usage, many have found their experience taking GLP-1 medications positive.

Across both segments, new product innovation opportunities abound, whether that be for helping mitigate digestive discomfort, muscle loss and dehydration for current GLP-1 users or by providing satiating solutions for those who have transitioned off the medications. Overall, what these consumers seek most are enjoyable, convenient and portion-controlled functional products tailored to meet their distinct needs.



ADM's Supportive Solutions Platform for Anti-Obesity Medication Users

During Use of AOMs

Maintaining Muscle Mass

ADM's soy-, pea- and wheat proteins and value-added beans and pulses deliver on protein content and diversity to support growth or maintenance of muscle mass.

Minimizing Gastrointestinal Discomfort

Within ADM's health and wellness portfolio are science-backed biotics with clinical results for helping support gut and digestive health^{1,2}.

Supporting Hydration

ADM's coconut water powder, sweeteners and flavor modulation solutions elevate the appeal of beverages to consumers who seek better hydration.

When Discontinuing Use of AOMs

Promoting Satiety

ADM's prebiotic dietary fiber, resistant tapioca starch and plant-based ingredients can be used to help increase fullness perception³.

Managing Weight Regain

Brands can leverage ADM's probiotic and postbiotic targeting aspects of metabolic health⁴, sweetening solutions and high-protein ingredients to support weight maintenance after AOMs.

SOURCES:

¹Srivastava, S., et al. (2024) *Gut Microbes*. 16(1):2338322

²Labellarte, G., et al. (2019) *Food and Nutrition Sciences*, 10, 626-634

³Ye, Z.; et al. (2015). *Nutritional Research*, 35, 393-400

⁴Pedret, A., et al. (2019) *Int J Obes (Lond)*. 43(9):1863-1868

Our products are not intended to treat, cure, or prevent any disease, nor are they designed to offer solutions for weight loss.