



Appetite for Disruption: What GLP-1 means for consumer markets

A snapshot on grocery: “benefit per bite”

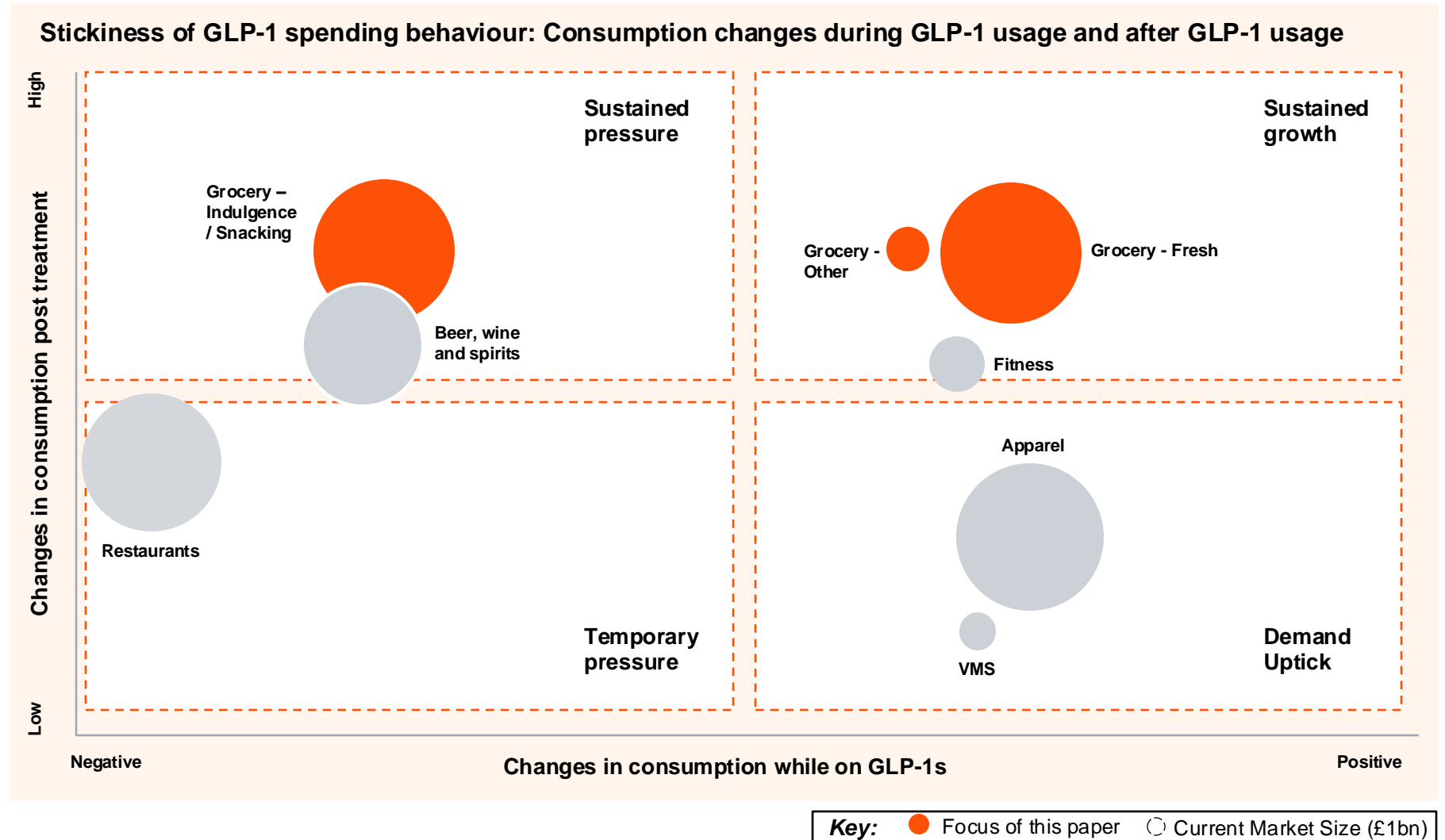


Impact of GLP-1 on grocery: accelerating shift to nutritional optimisation

When a nation's appetite shrinks, food spend does not simply fall – it reallocates.

A single class of medication is already influencing how millions of people in Britain eat, drink, exercise and shop. The impact on **Britain's bodies, baskets and businesses** is only beginning to be understood. So, we have surveyed more than 2,300 adults in the UK to gain a deeper understanding of who is using GLP-1 and how their behaviour is changing. What we found has real consequences for any brand or retailer competing for a share of GLP-1 consumer spend.

For **grocery**, GLP-1 is reshaping parts of the grocery basket, marking a structural shift away from calorie consumption and towards nutrition. Spend is moving away from appetite-led categories such as snacks, sugary drinks, alcohol and eating out, and towards fresher, higher-protein and more nutrient-dense choices accelerating shifts that were already underway. The question every food brands and retailers now face is which changes are temporary, and which reset category growth for good.



Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

The GLP-1 grocery basket: less impulse, more intent

Shrinking occasions

GLP-1 is reducing the everyday prompts that drive food and drink demand. 79% of users think about food less often, weakening the role of hunger, impulse and routine. Behaviours are also becoming more planned: 36% are meal prepping or batch cooking more, and 50% are tracking calories and nutrition. For brands, this is a chance to move from impulse-led demand to more intentional, needs-based occasions, with greater relevance, stronger loyalty and clearer value for the consumer.

Basket reallocation

GLP-1 puts pressure on grocery spend during treatment, with a -33 percentage point net spending intention but spend does partially rebound after stopping. The bigger opportunity is where demand is moving: users report increased preference for healthier foods (70%), fresh fruit and veg (56%), high-protein options (54%), nutrient-dense foods (51%) and fibre-rich foods (46%). As volumes come under pressure, brands should look to selective premiumisation to help alleviate volume pressure, capture a higher-value basket or offset decline, by demonstrating clear benefits: nutrition, functionality, quality or convenience.

Basket stickiness

GLP-1 is helping reset shopping habits, not just suppress appetite. After stopping, spend partially rebounds, but 83% of previous users maintained at least some grocery spend changes. Yet, this provides a long-term opportunity: a basket that can recover in value while also being anchored in new priorities such as planning, health and portion control.

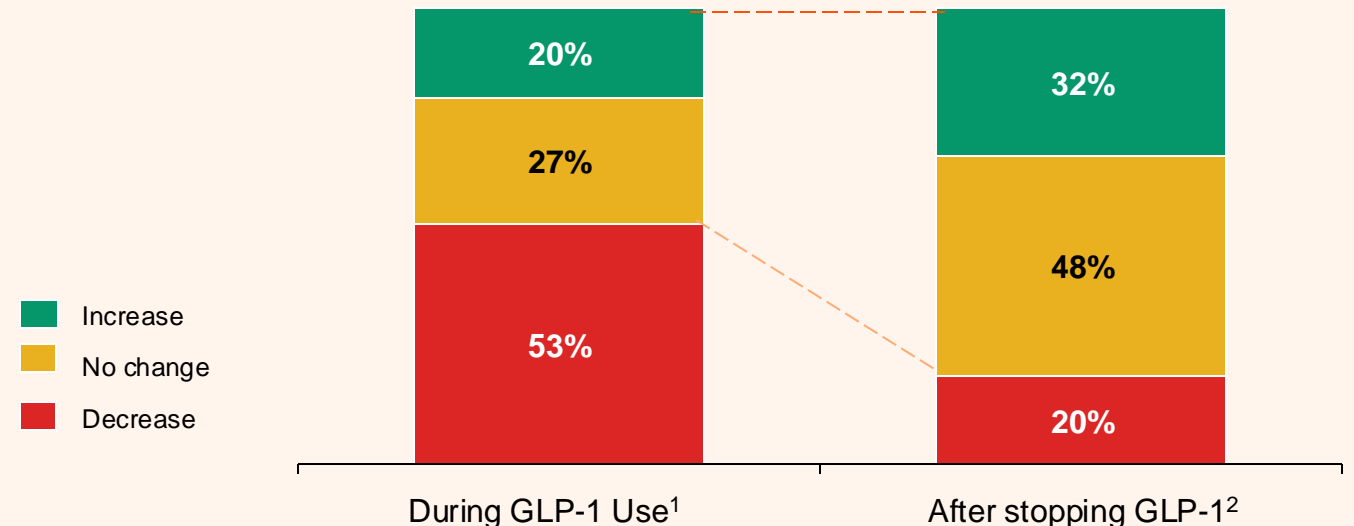
Grocery spend declines during GLP-1 use, with some recovery after stopping

Changes in grocery spend intentions % of respondents

Net intent²:

-33%

+12%



Notes: 1) Previous GLP-1 users who have not taken GLP-1s in the past 12 months; 2) Delta between proportion of respondents indicating positive and negative change in spend intention | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

The GLP-1 grocery basket: the age and income divide

Impulse is weakening but not in the same way for everyone

GLP-1 reduces appetite-led demand across age and income groups, but not in the same way. 45+ consumers show the highest reduction in snacks / confectionery / crisps at 76%, while 18–34s show the sharpest reduction in sugary drinks at 70%. By income, the pattern is equally broad: reductions in snacking remain high, from 70% under £35k to 66% among £75k+.

The implication: Segmenting GLP-1 users by age, income and occasion is critical, the medication alone does not predict behaviour.

Health-led growth is strongest where intent and spending power meet

The shift into healthier staples is not evenly distributed. 81% of 35-54s increased preference for healthier foods, compared with 39% of 55+. Income sharpens the effect: 81% of £75k+ consumers increased preference for healthier foods, while 67% increased preference for nutrient-dense foods, compared with 64% and 53% respectively under £35k.

The implication: Growth comes by identifying the moments and occasions where healthier choices matter most, and where consumers are willing to trade-up

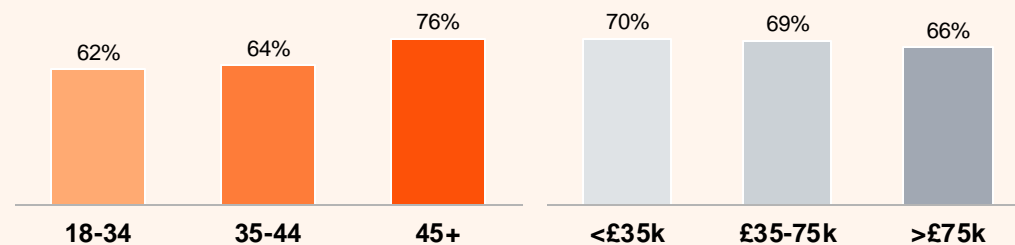
Protein and premium are big opportunities but not for everyone

Younger and higher-income consumers are more likely to move into “benefit per bite” propositions. 67% of 18-34s increased preference for high-protein options, versus 42% of 55+; by income, this rises to 63% among £75k+, versus 49% under £35k. Premiumisation is even more income-sensitive, with 38% of £75k+ increasing preference for premium branded foods, compared with 22% under £35k.

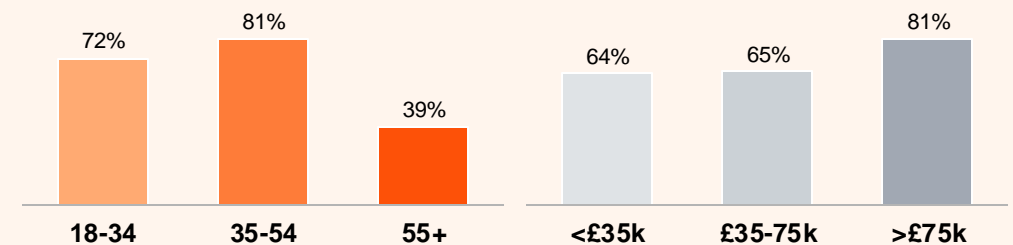
The implication: premium can offset volume pressure, but mainly where it is tied to clear benefits.

Spend change by category by age and income group¹ % of respondents

Spend decrease in snacks / confectionery / crisps



Spend increase in healthier foods



Notes: 1) We'd like to understand how your diet has changed as a result of taking GLP-1. For each of the categories below, please tell us if your preference for that category has increased or decreased compared to before taking GLP-1. The % represent the % of respondents who choose to increase / decrease in the specified category | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

Winning the GLP-1 basket: "benefit per bite"

Reshape what's at risk

The priority is to protect categories most exposed to fewer appetite-led occasions. GLP-1 users are not just switching products; they are snacking less, planning more and buying with greater intent. Indulgent snacks, confectionery, crisps, sugary drinks and alcohol need to be redesigned for smaller, more purposeful consumption moments.

- Reframe snacks, confectionery and crisps around portion control, permissible indulgence and "worth it" treat moments
- Identify SKUs most exposed to impulse, grazing and top-up occasions and decide whether to reformulate, resize or rationalise
- Shift sugary drinks from large-format refreshment towards low / no sugar, hydration, electrolytes and functional benefits

Capitalise where value is moving

Growth is moving towards products that deliver more benefit per bite. This is not blanket premiumisation; it is value linked to nutrition, functionality, quality and convenience. The opportunity is strongest where health intent overlaps with spending power, particularly among working-age and higher-income consumers.

- Accelerate ranges in high-protein, fibre-rich, nutrient-dense, fresh and healthier meal solutions
- Use front-of-pack cues that make benefits easy to understand: protein, fibre, calories, fruit / veg portions, gut health and hydration
- Build tiered propositions: accessible health for value-conscious shoppers and premium functional ranges for higher-income users

Collaborate beyond the basket

For GLP-1 users, grocery is part of a broader weight management and wellness journey long after the treatment stops. Retailers and brands can create more value by connecting food, pharmacy, digital health, supplements and behaviour-change support across multiple consumer touch points.

- Work with appropriately governed health, pharmacy and nutrition partners to develop evidence-led weight-management meal planning, portion-control and nutrition support, avoiding medicine promotion or unapproved health claims.
- Link grocery, pharmacy and loyalty data to identify category exposure by age, income and shopper mission
- Develop content and tools for post-treatment maintenance, when spend rebounds but changes in grocery behaviours persist

“ GLP-1 is not creating a single grocery response. The winners will protect exposed categories, build benefit-led propositions and tailor the response by generation, income and mission rather than treating GLP-1 users as one consumer

Emma Burton

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Please get in touch to hear more

About the consumer survey methodology

In June 2026, Strategy& conducted a comprehensive survey of 2,315 UK consumers aged 18–65+ to understand who is using GLP-1 (current and past), why they are using it, how they are accessing it, and how they are changing their spending habits across grocery, alcohol, VMS, apparel, restaurant and fitness categories. The survey was run before the approval of the GLP-1 pill for weight loss in the UK.



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