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

A snapshot on vitamins, minerals, supplements (VMS): 'Daily Dosage'

July 2026

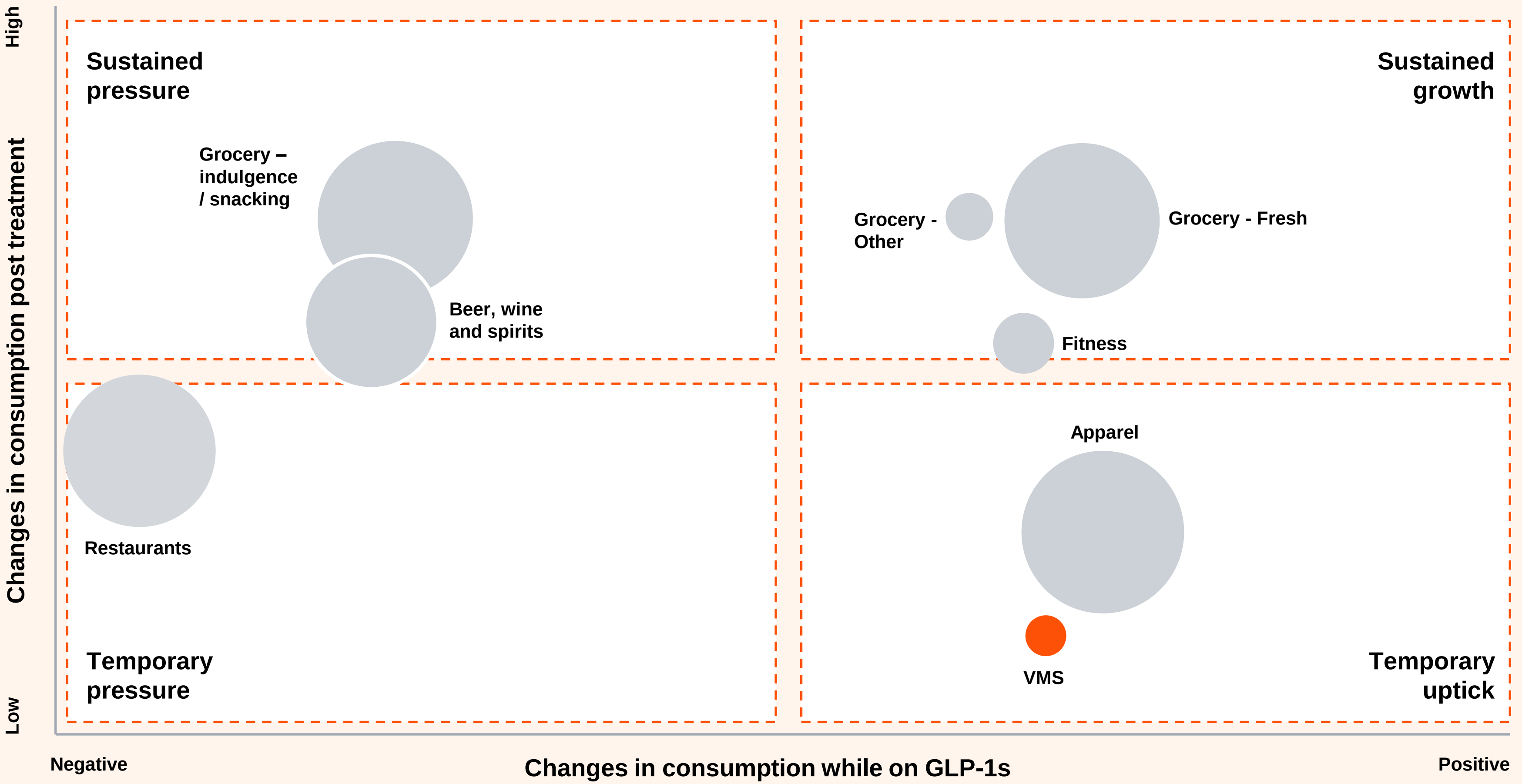
Impact of GLP-1 on VMS: turning supplements into purposeful support

As GLP-1 reshapes bodies, supplements are gaining a clearer role in the weight loss journey.

GLP-1 drugs are already changing how millions of people in Britain eat, drink, exercise and shop. And society is only just beginning to understand the impact on **Britain's bodies, baskets and businesses**. We surveyed more than 2,300 UK adults to explore who is using GLP-1 and how it is changing their behaviour. The findings are important for any brand or retailer trying to win spend from GLP-1 users.

For **vitamins, minerals, supplements (VMS)**, GLP-1 is changing supplements from a nice-to-have into part of the daily wellness routine. Users are turning to protein and creatine to preserve muscle, to fibre and pre/probiotics to support digestion, and to minerals and electrolytes to supplement nutrients that may be lost through reduced intake. VMS is also converging with beauty, as rapid weight loss creates new needs around skin elasticity, firmness and ageing, pulling collagen and functional-beauty products into the same wellness routine.

Stickiness of GLP-1 spending behaviour: consumption changes during GLP-1 usage and after GLP-1 usage



Key: Current Market Size (£1bn)
Focus of this paper

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

The GLP-1 VMS basket: from occasional supplements to daily dosage

Daily dosage

VMS is already part of everyday wellness for many UK consumers, with 55% taking vitamins, minerals or supplements often or always. But during GLP-1 treatment, that habit becomes even more intentional: around 40% of users increase their VMS spend, and about a fifth of those increase it by more than 15%. The VMS category is also bringing in new buyers. Four in ten GLP-1 users had not taken vitamins or supplements before starting treatment, creating an opportunity to expand the category and increase spend.

Basket reallocation

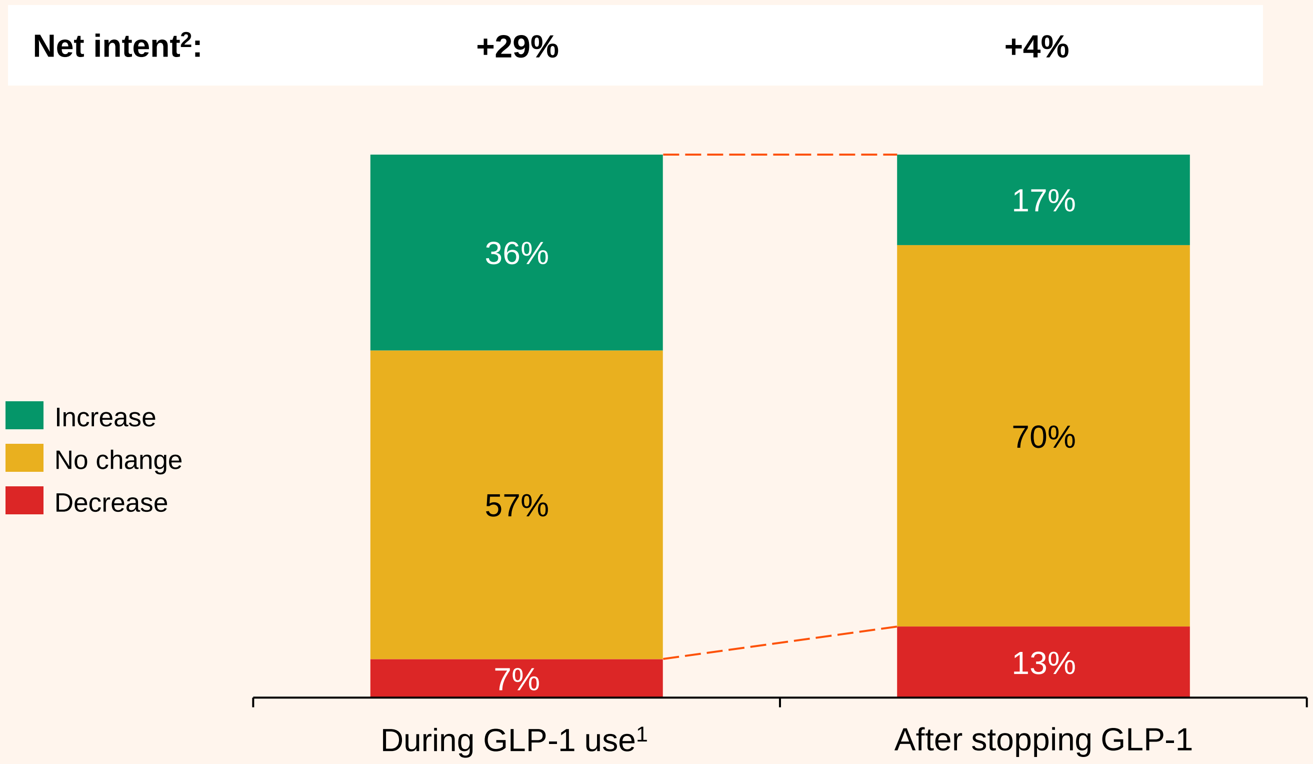
GLP-1 is expanding the VMS basket rather than simply shifting spend between supplement types. Protein powder shows the biggest increase, with around 56% of users increasing spend, followed by letter vitamins (e.g. vitamin D, vitamin C) at around 48%, collagen at around 43%, and pre/probiotics at around 37%. Few users are cutting back, with declines sitting in the low single digits across categories. For brands, there is an opportunity to create evidence-backed, multi-need propositions — for example linking VMS with beauty-from-within products as weight loss creates needs around skin elasticity, firmness and visible ageing.

Basket education

After users stop taking GLP-1, VMS demand remains above pre-treatment levels, but the uplift moderates sharply: net spend intent falls from +29% during treatment to +4% after stopping. Brands therefore cannot rely on treatment-led demand alone but need to educate consumers on what support is needed during active weight loss and after treatment, from weight maintenance and muscle preservation to digestive support, hydration and managing visible side effects.

VMS spend increases during GLP-1 use; VMS demand appears sticky beyond treatment, but the post-GLP-1 uplift moderates sharply

Changes in VMS spend intentions, compared to before GLP-1 usage
% of respondents



Notes: 1) Current GLP-1 users and 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, PwC Voice of the Consumer 2026 Survey, Strategy& Analysis

The GLP-1 VMS basket: the gender and body composition effects

Men and women are buying different types of supplements

GLP-1 is lifting demand for VMS across genders, but the pattern varies by category. Men are more likely to increase spending on sports nutrition products: 67% say they are spending more on protein, compared with 47% of women, and 41% are spending more on creatine, versus 22% of women. Women are more likely to increase spending on hydration and micronutrient products, with higher reported spend on minerals, including magnesium, zinc and iron (58% versus 41% of men), electrolytes (61% versus 37%) and collagen (50% versus 33%).

The implication: Gender helps identify consumers' preference, but the proposition should be built around specific need states.

Body composition is a stronger driver of demand than spending power

Body composition shapes what people feel they need. Users with a BMI of 25 or above are more likely to focus on filling nutrient gaps and managing digestive side effects linked to eating less, and therefore buy fibre, pre/probiotics, multivitamins, minerals and letter vitamins. Fibre spend rises among 52% of this group, compared with 32% of users[2] with a BMI of 18–25, while pre/probiotics show a similar pattern at 41% versus 26%. Users with a BMI of 18–25 are more likely to focus on maintaining lean mass during weight loss, with 68% increasing spend on protein versus 50% of users with a BMI of 25 or above.

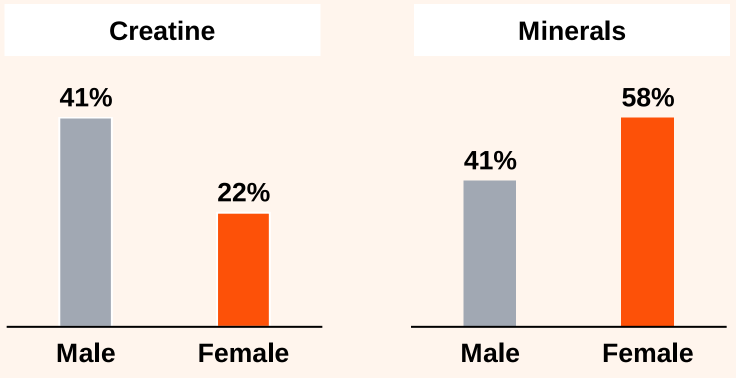
The implication: VMS growth will be won at sub-category, not category level: products, claims and marketing must match different body needs.

Age and income shape demand unevenly in specific categories

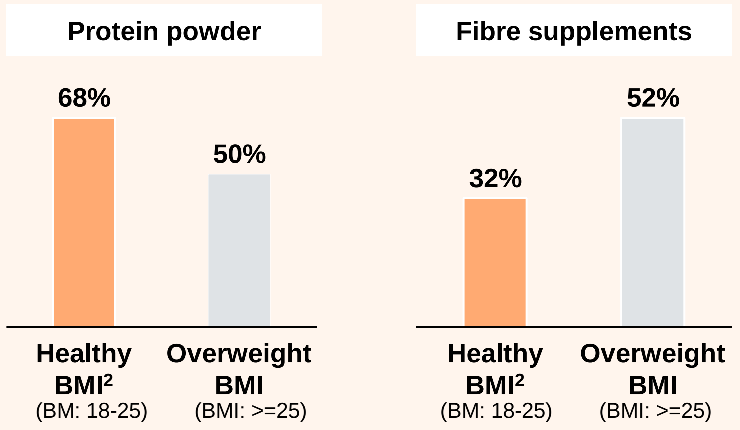
Protein powder sees the greatest increase in spend among younger and more affluent users, with the greatest increases in spend among 25–34s (64%) and those earning £50k–£100k (67%). Among 35–54s, demand broadens across the VMS basket: 58% report increased spend on multivitamins and 50% on collagen, with both increases consistent across income groups. Electrolyte spending shows the strongest link to income, with around 60% of those earning more than £35k reporting increased spend, compared with 20% of those earning less. The uplift in electrolyte spend is also concentrated among users under 54.

The implication: Guidance and education are needed for GLP-1 users to find the right products for their age, income and need state.

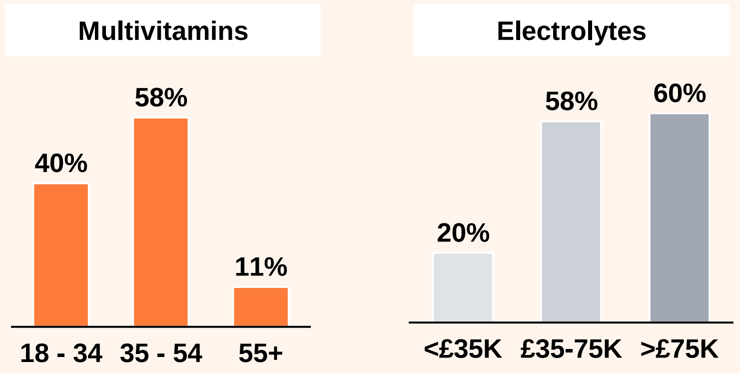
Spend increase comparison by gender[1]
% of respondents



Spend increase comparison by BMI[1]
% of respondents



Spend increase comparison by age and income[1]
% of respondents



Notes: 1) You mentioned your spend on vitamins and supplements changed as a result of taking GLP-1. For each of the categories below, please tell us if your spend increased or decreased as a result of taking GLP-1. The % represent the % of respondents who choose to increase / decrease in the specified category; 2) GLP-1s are indicated for people with BMI over 25 but people with BMI less than 25 are able to take them to maintain weight loss already achieved after starting on GLP-1 | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact, Strategy& Analysis

Winning the GLP-1 basket: the wellness stack

Reshape around the GLP-1 journey

Brands and retailers should build a clearer support system around the GLP-1 journey. Many users are new to supplements, which gives brands and retailers a chance to help them choose the right products at the right stage.

- Build a “GLP-1 essentials” range across protein, fibre, electrolytes, multivitamins, collagen and digestive support, designed around the GLP-1 journey
- Reframe SKUs around needs – muscle, digestion, hydration and skin – rather than generic wellness
- Personalise propositions by stage, from treatment initiation through to maintenance

Capitalise where need is growing

Demand follows a clear set of needs: muscle, digestion, hydration and skin. The brands best placed to win will be those that build credible, evidence-backed propositions around the needs GLP-1 users actually experience.

- Lead with protein and hydration as gateway categories into the wider VMS basket
- Develop clearer muscle-preservation and recovery propositions to address a key concern during rapid weight loss
- Build post-treatment maintenance ranges to capture demand beyond active use
- Use evidence, ingredient transparency and clear claims as the premium lever

Collaborate to make demand last

VMS demand falls back after users stop GLP-1 treatment, so brands need to stay relevant beyond active treatment. For example, supplements and beauty can converge into a broader maintenance routine, with collagen as a natural bridge.

- Enter adjacent categories such as functional food and drink, sports nutrition, hydration and beauty
- Partner with pharmacies, telehealth providers, fitness platforms, nutrition specialists and others to support users from treatment initiation to maintenance
- Consider partnerships or M&A to accelerate entry into adjacent growth areas (e.g. hydration, beauty)
- Use credible influencer networks to turn science-based information into practical, trusted advice
- Work with grocery retailers to bring GLP-1-aware VMS ranges into mainstream aisles

> “GLP-1 is not just a weight loss story. It's also a nutrition story. GLP-1 users are eating less but need more per bite which requires a stack of nutrient-dense food and targeted VMS solutions - creating opportunities for brands and investors, not just during treatment but also afterwards.

Inge Cajot

Strategy& Partner, Consumer Markets

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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