



Consumers' Expectations about GLP-1 Drugs Economic Impact on Food System Players

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Introduction

Glucagon-like peptide-1 receptor agonists, often abbreviated as GLP-1, have taken the dieting world by storm, with far-reaching implications for how we eat. Indeed, the explosion of interest in GLP-1 medications, such as Ozempic and Wegovy, has already begun to generate waves far beyond the healthcare sector. While these drugs were initially developed to manage diabetes, their increasing use for weight loss is altering consumer behavior in ways that could significantly impact the entire food supply chain. Early evidence suggests that individuals using GLP-1s spend significantly less money at the grocery store, shifting their purchasing habits away from snacks, alcohol, and carbohydrates while also increasing demand for high-protein and nutrient-dense foods (e.g., [Roe, 2025](#); [Hristakeva, et al., 2024](#); [Bettadapura et al., 2024](#); [Moran, 2025](#); [Balagtas, et al., 2024](#); [Bina and Tonsor, 2025](#)). The use of the drugs has increased substantially in recent years (e.g., [Lee, et al., 2024](#); [Montero, et al., 2024](#)), though the medications are still financially out of reach for many U.S. consumers ([Amin et al., 2023](#)). While the length of these effects is unclear ([Circana, 2025](#)), these consumption changes are likely to have sweeping consequences for each grocery store, restaurant, food manufacturer, retailer, and farmer in the food system.

As policymakers and industry leaders seek to anticipate and respond to these shifts, understanding how consumers perceive the economic impact of GLP-1 drugs on the food system might provide an early indicator for understanding the food system implications of GLP-1s. To that end, we analyzed data from the most recent wave of the Gardner Food and Agricultural Policy Survey (GFAPS), conducted in

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February 2025. Our findings reveal that consumers—particularly those who have used or are considering using GLP-1 drugs—expect the food industry to undergo significant changes.

Methods

The GFAPS is an online, national survey conducted quarterly. Each wave, approximately 1,000 U.S. consumers are recruited to match the population in terms of gender, age, region, and household income. Here, we discuss results from Wave 12, conducted in February 2025.

Results

Using results from the GFAPS, we unpack how participants' expectations about the impacts of the drugs differ across their experience with GLP-1 drugs. First, participants were asked about their experience with GLP-1 drugs (see Table 1). While most of our sample (60.6%) indicate they have never used a GLP-1 medication, 12.0% said they are currently using a GLP-1 medication, and 7.9% said they utilized a GLP-1 drug previously. Importantly, highlighting the increasing popularity of the drugs, 19.5% of participants indicated that while they have not yet used a GLP-1 medication, they are considering using one in the next year. The KFF Health Tracking Poll from May 2024 found that 12% of U.S. adults reported that they had previously used a GLP-1 medication ([Montero, et al., 2024](#)), which has been increasing in popularity (e.g., [Regalado, 2024](#); [Rahhal, 2025](#); [Hunter and Sanders, 2025](#)).

Table 1. Participants' Experience with GLP-1 Medications

	% of Participants
I am currently using a GLP-1 medication	12.0%
I have used a GLP-1 medication in the past	7.9%
I have never used a GLP-1 medication	60.6%
I have not used a GLP-1 medication, but I am considering using it in the next year	19.5%

For analysis below, we group participants with personal GLP-1 experience (those who either currently or have previously taken GLP-1 medications, n=204) and those without (n=819). Over 75% of participants said they were familiar with GLP-1 drugs before the survey.

We first asked participants whether they thought the growing popularity of GLP-1 drugs will change Americans' dietary preferences and food purchasing habits. Response options included yes, significantly; yes, somewhat; no, not much; and no, not at all. Table 2 shows that 43.1% of participants with experience using GLP-1 drugs expected the drugs to have a significant impact on preferences and purchasing habits, compared to just 14.3% of those without experience with the drugs.

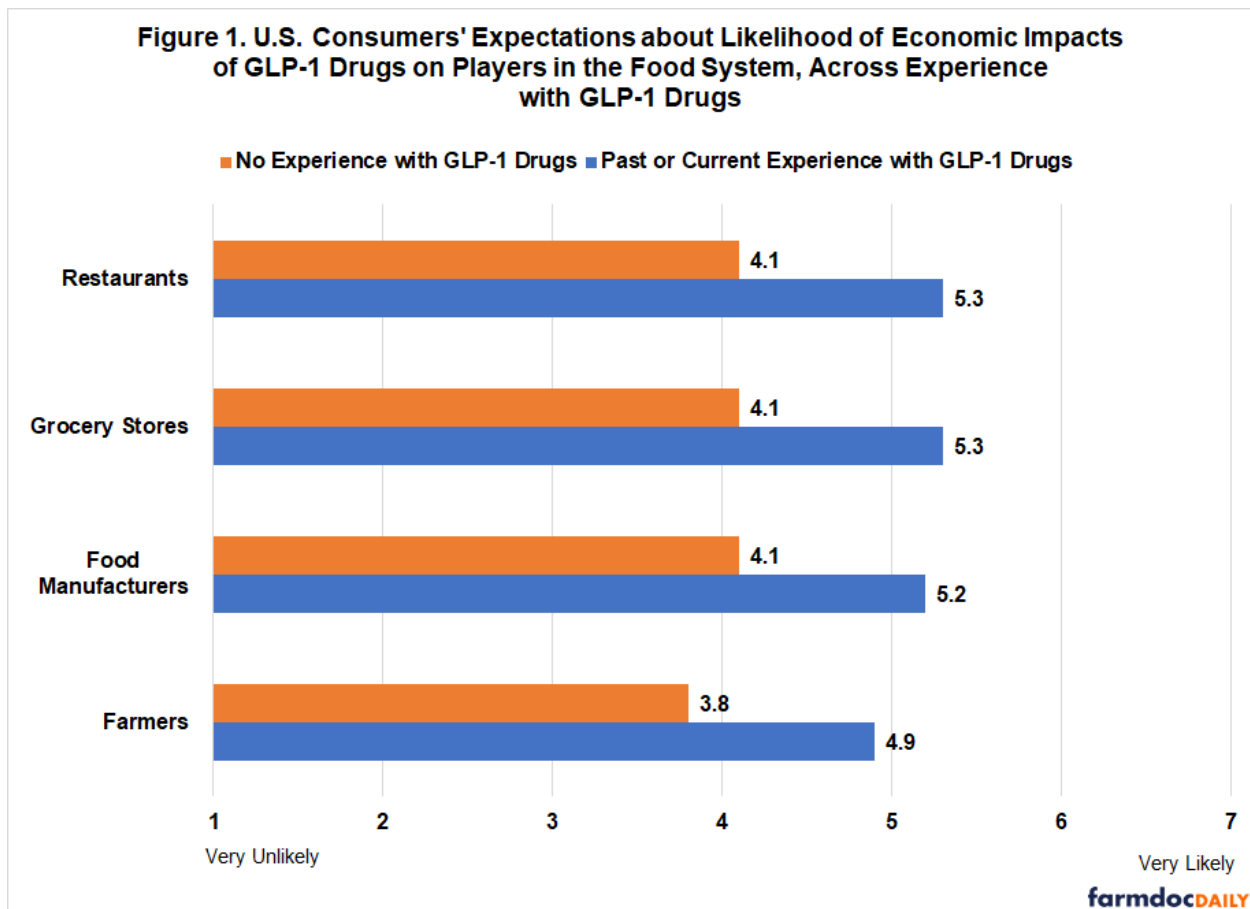
Next, we wanted to explore to what extent consumers connected these expected changes in diet and food purchasing to economic impacts on food system actors. Before asking participants about their expectations for the drugs' impacts on the food system, all participants were given a brief background on the topic, which said: "GLP-1 drugs decrease users' appetite, which results in fewer calories consumed. This shift can impact the amount of food purchased, the types of foods purchased, and the amount of food wasted."

Participants were then asked to rate the likelihood that GLP-1 drugs will impact economic outcomes (e.g., profitability) of different food system players, from 1=very unlikely to 7=very likely. Participants answered the question for four food system groups: farmers, food manufacturers, grocery stores, and restaurants. The order of the food system players was randomized to prevent ordering effects.

Table 2. To What Extent Participants Expect GLP-1 Medications to Impact Americans' Dietary Preferences and Food Purchasing Habits

	Past or Current Experience with GLP-1 Medications (n=204)	No Experience with GLP-1 Medications (n=819)
Significantly	43.1%	14.3%
Somewhat	40.7%	39.4%
Not much	13.7%	34.4%
Not at all	2.5%	11.8%

Figure 1 shows the average likelihood rating for each food system player across participants with and without GLP-1 medication experience. Results highlight that consumers with GLP-1 medication experience are much more likely to expect the drugs will have an economic impact on players across the food system. Across both groups, consumers believe that restaurants, grocery stores, and food manufacturers are slightly more likely to be impacted than farmers.



Put another way, our findings suggest that anyone with firsthand experience with GLP-1 medications thinks that they will have a significant impact on the players of the food system. Those who have used or

are currently using these drugs have a direct understanding of their effects on appetite suppression and food consumption, making them more attuned to the potential downstream consequences for food-related businesses. Because they have personally experienced a reduced desire for food, they are more likely to anticipate a decline in overall demand, translating into lower revenues and profitability expectations for restaurants, grocery stores, and food manufacturers. By contrast, those without experience using GLP-1 drugs are less likely to fully grasp the extent of these dramatic behavioral changes, leading them to be more skeptical or uncertain about potential economic disruptions. This finding reinforces the idea that as GLP-1 adoption grows, so too will concerns about its ripple effects across the agri-food supply chain.

Conclusions

GLP-1 drugs are increasingly popular for their ability to combat obesity, a significant public health problem in the U.S. Additionally, research is ongoing to determine whether these drugs can also be used to treat drug addictions, Alzheimer's, and Parkinson's diseases (Beckwith, 2023). While uptake of these drugs is growing, less is known about how the use of GLP-1s could impact food system actors.

Using the most recent wave of the GFAPS, we explore consumers' expectations about the impact of GLP-1 medications on the food system. We find that those who have current or past experience with GLP-1 drugs expect the drugs to have a bigger impact on consumers' preferences and habits. We also find that those with experience with GLP-1 drugs reported high likelihoods that the drugs will economically impact firms across the food system – including restaurants, groceries, food manufacturers, and farmers.

Based on reported changes in diet and food spending among GLP-1 users, Roe (2025) attempts to quantify what this could mean for the food system. Assuming a 10% GLP-1 usage rate among overweight adults and a 20% usage rate among obese adults in the U.S., Roe (2025) estimates this could lead to a 3% reduction in total caloric demand, which amounts to 20 billion fewer calories of food consumed per day and about \$1.2 billion less spent per week.

Already, some restaurants are responding to the change in eating behaviors. For example, Smoothie King has added a GLP-1 Support Menu (Fantozzi, 2024). Others are reviewing menus, portion sizes, and flavors (Redman, 2025; MRM, 2025).

Similarly, food brands and manufacturers are responding – adding GLP-1 friendly labels to products, highlighting relevant attributes (e.g., high protein, high fiber, sugar-free), making plans to sell smaller portions, or launching new products (Doering, 2025; Doering, 2024a; Doering, 2024b; Coleman, 2025; Nunes, 2025).

Retailers have also begun adjusting to meet the needs of these customers, including changing up ready meal offerings to increase protein and vegetables, stocking more on-the-go protein enhanced beverages, and highlighting products to help with side effects (e.g., gum to help with nausea) (Kendall, 2025; Moran, 2025; Ulie, 2025).

Agriculture is also likely to be impacted, both through the decreased demand for food overall and the shift to increased preferences for protein (Roe, 2025; Balagtas, et al., 2024; Bina and Tonsor, 2025). At this year's USDA Agricultural Outlook Forum panel, some suggested slowing food demand from both GLP-1 drugs and slowing population growth may require agriculture to increase its focus on nutritionally dense food, rather than production volume (Hagstrom, 2025).

Finally, it is important to note that the popularity of the drugs is ballooning (Montero, et al., 2024; Regalado, 2024). In the most recent GFAPS wave, nearly 20% of respondents said that they have not yet used the drugs, but they are considering using them this year. The growing share of GLP-1 users will likely further push adaptation across food system actors.

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