Innovating in a GLP-1 world

Helen Bass
\ VP, Global Marketing and Insights, Tate & Lyle

1 in 10

are currently on GLP-1 medication and 1 in 10 have been in the past

Oral GLP-1

tablets available

2.8m

UK adult users by 2030 (32m in US)

Source: T&L Proprietary Research, ING forecast

EARLY ENTHUSIASM >>

3-6 months actively using

Active Label Engagement

Experimenting with new, healthier foods

MOMENTUM >>

6-12 months actively using

Dual-focus on diet and exercise

Medical advice most integrated

MAINTENANCE >>

3-6 months former usage

Healthy habits vs new habits

Engagement in healthy habits drops

REGRESSION >>

>12 months former usage

Combined diet + exercise efforts decline

Attention to label declines

Source: T&L Proprietary Research, ING forecast

Reduction in Calories

Reduction in shopping basket value

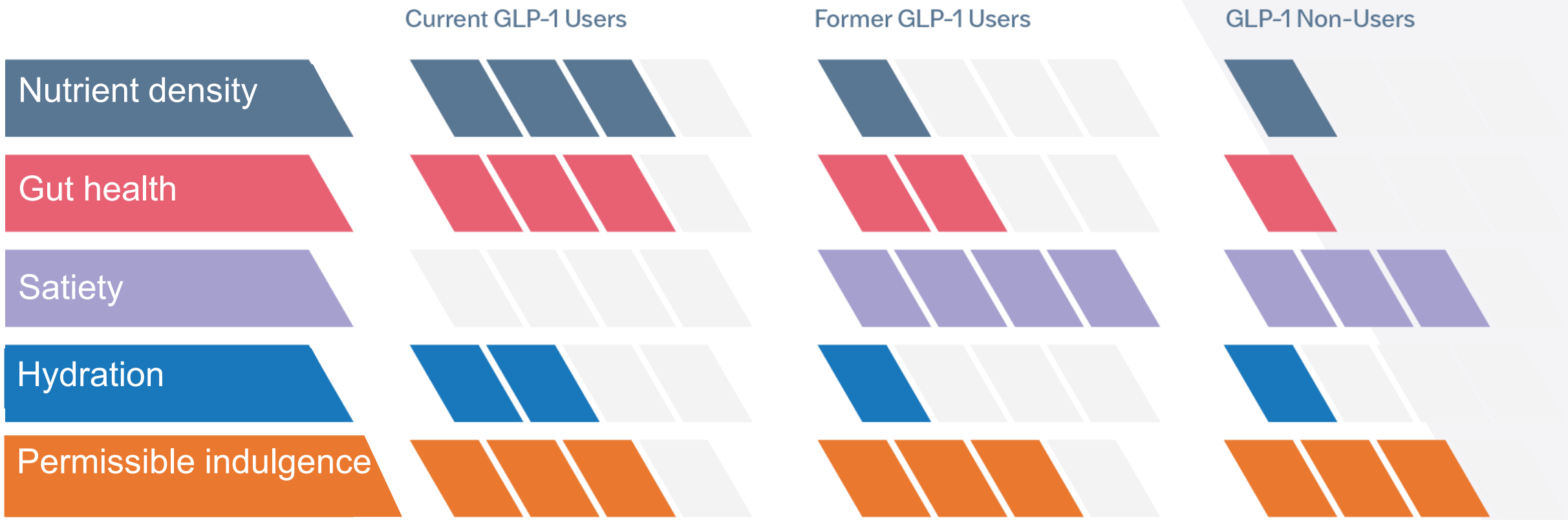
Diminished taste perception

\ Fewer calories

\ More nutrition

\ Continued enjoyment

Hierarchy of need differences and considerations: beyond active GLP-1



<Source:

\ 74% of GLP-1 users increase yoghurt consumption

\ Strong snack category

\ Protein and fibre

\ 29% of GLP-1 users decrease tortilla chip consumption

\ Permissible indulgence

\ Protein and fibre

Fibre Benefits

- Bone health
- Brain health
- Heart health
- Skin health
- Mood and mind

Not known at all

- Sugar reduction
- Glycaemic response

Lesser known

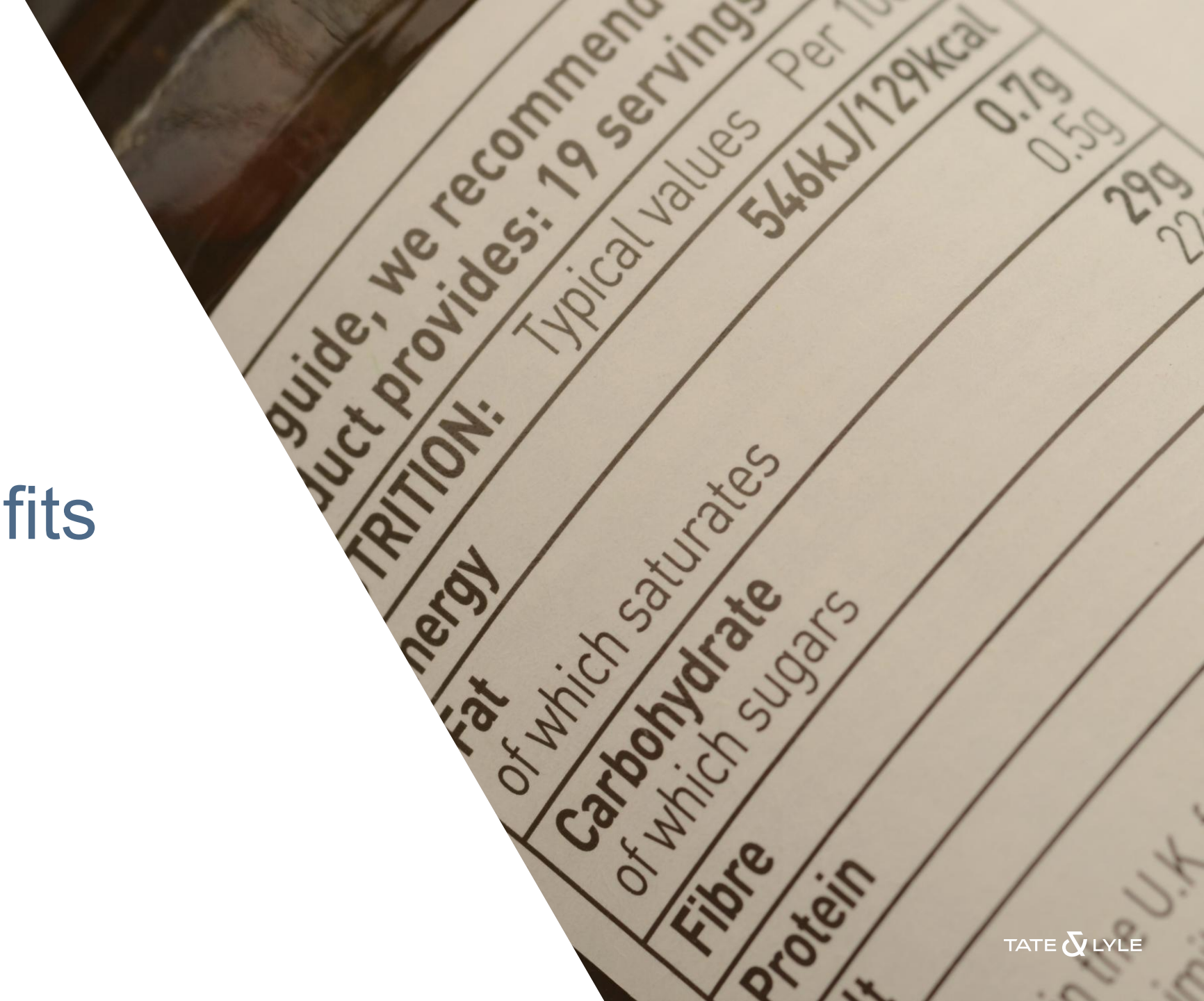
- Weight management
- Satiety

Emerging familiarity

- Gut microbiome (prebiotic) support
- Digestive health

Most top of mind

\ Credible benefits from food and beverages



TATE & LYLE

\ Benefits that consumers understand

TATE & LYLE

\ Convenient products for consumption occasions

Emphasising taste, delivering on texture and stability

TATE & LYLE


TATE & LYLE
Thank You