

Innovating in a GLP-1 world

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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)

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



Reduction in
Calories



Reduction in shopping
basket value



Diminished taste perception

\ Fewer calories

\ More nutrition

\ Continued enjoyment



Nutrition Facts
Serving Size 1 Cookie (30g)
Servings Per Container About 5

Amount Per Serving

Calories 160, Calories from Fat 70

Total Fat 5g

Saturated Fat 3.5g

Trans Fat 0g

Cholesterol 0mg

Sodium 60mg

Total Carbohydrate 19g

Sugars 9g

Protein 2g

Vitamin A 0% • Vitamin C 0%

Calcium 0% • Iron 2%

*Percent Daily Values are based on a diet of other people's secrets.

Total Fat Less than 5g 10%

Sodium Less than 300mg 6%

Total Carbohydrate Less than 35g 6%

Sugars Less than 10g 20%

Protein 2g 4%

Percent Daily Values are based on a diet of other people's secrets.

NET WT 6 OZ. (170g)

Nutrition Facts
Serving Size 2 Cookies (60g)
Servings Per Container About 3

Amount Per Serving

Calories 320, Calories from Fat 140

Total Fat 10g

Saturated Fat 7g

Trans Fat 0g

Cholesterol 0mg

Sodium 120mg

Total Carbohydrate 38g

Sugars 18g

Protein 4g

Vitamin A 0% • Vitamin C 0%

Calcium 0% • Iron 4%

*Percent Daily Values are based on a diet of other people's secrets.

Total Fat Less than 10g 20%

Sodium Less than 240mg 5%

Total Carbohydrate Less than 70g 8%

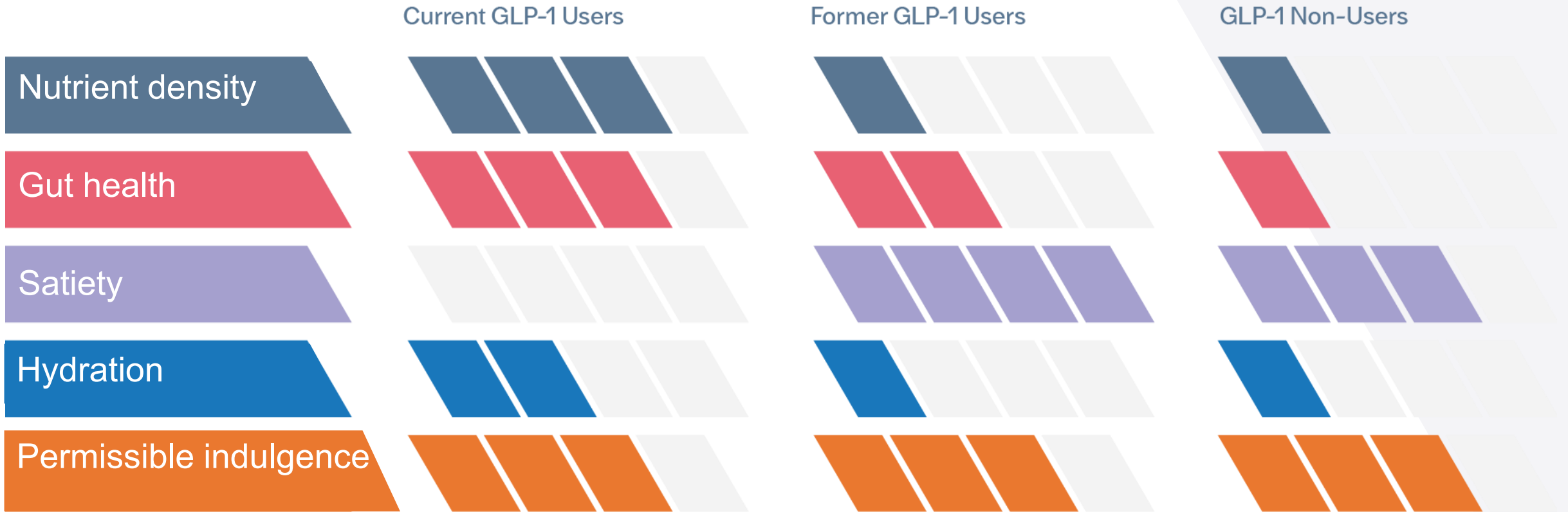
Sugars Less than 20g 40%

Protein 4g 8%

Percent Daily Values are based on a diet of other people's secrets.

NET WT 6 OZ. (170g)

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



\ 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



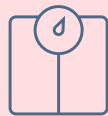
Sugar reduction



Glycaemic response



Weight management



Satiety



Gut microbiome (prebiotic) support



Digestive health



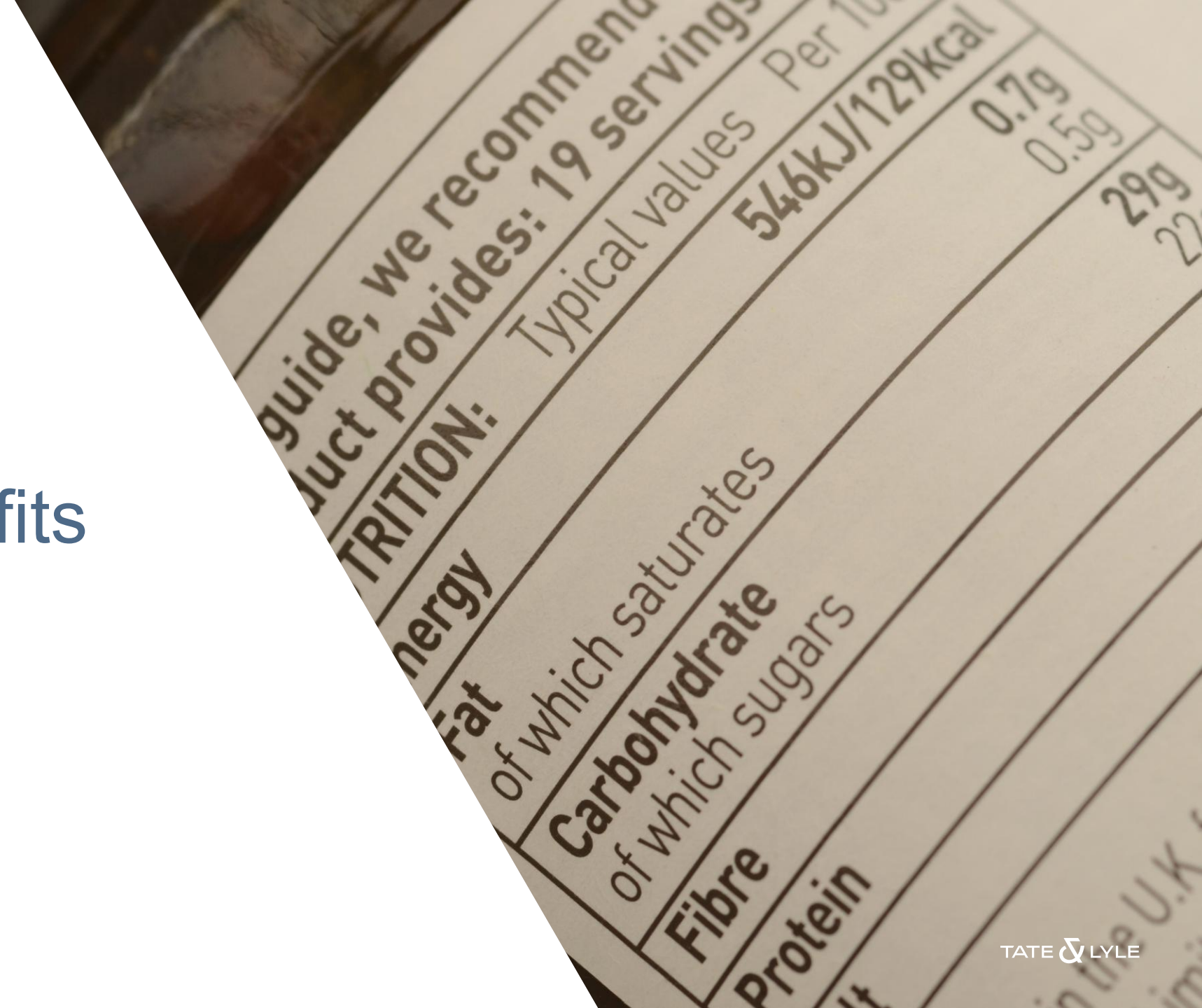
Not known at all

Lesser known

Emerging familiarity

Most top of mind

\ Credible benefits from food and beverages



\ Benefits that
consumers
understand

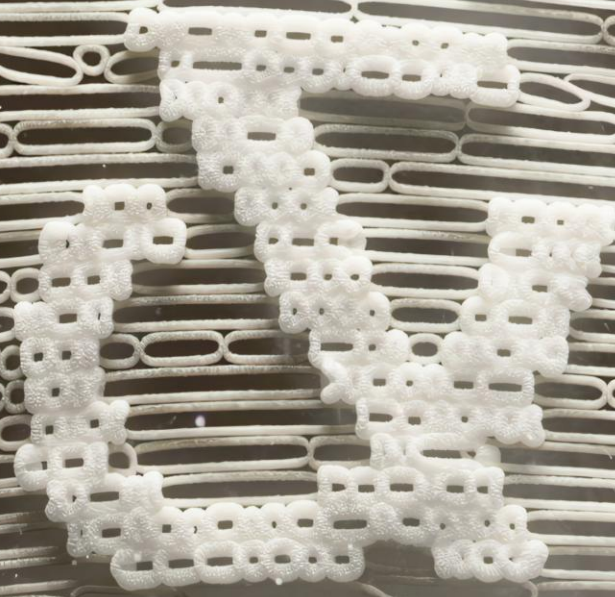


\ Convenient products for consumption occasions



Emphasising taste,
delivering on texture
and stability





Thank You