



# The Evolving Impact of GLP-1 Drugs

The logo for the National Association of Chain-Drug Stores (NACDS) is shown in white, serif capital letters, centered within a dark blue rectangular box with rounded corners.

**Sherry Frey, NIQ**

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December 2024

*Please feel free to contact Sherry  
if you'd like to have information  
presented/talked through  
with your teams.*

# 'Ozempic Babies': How Drugs Can Interfere with and Boost Fertility

There is a wide range in how much weight people lose on GLP-1 medications

By Sumathi Reddy April 1, 2024 5:30 am ET

## Agonists for Obesity—A New

HEALTH NEWS Fact Checked

# Most People Stop Using Ozempic and Wegovy After a Year, What Explains This?

By Meagan Drilling on July 26, 2024

# Is the Era of 'Brozempic' Upon Us?

Some telehealth start-ups are playing up masculine stereotypes in marketing medications that have been more widely associated with women.

# Ozempic is coming for industries next

Weight loss drugs pose a real threat to the industry opportunities for producers to expand in

Published Feb. 26, 2024

# Ozempic to Send Foodmakers Looking for Healthier Offerings

Companies should consider smaller portions, fresh ingredients or offloading unhealthy brands as weight-loss drugs take off, respondents say.



# Treatments to Keep Weight Off After Ozempic

Obesity researchers and companies turn toward helping people maintain losses

# Ozempic is coming for gyms

# How Supplement Stores Are Trying to Tap Into the Ozempic Boom

GNC and the Vitamin Shoppe are redesigning displays and taking other steps to appeal to people who are taking or are

# Ozempic Might Help You Drink and Smoke Less

Animal studies suggest GLP-1 drugs alter behaviors associated with reward and pleasure

# F.D.A. Seizes Thousands of Units of Counterfeit Ozempic

The agency and Novo Nordisk, the company that makes Ozempic, are testing the seized medications to determine what is in them.

TikTok, Facebook and Instagram are supplanting physicians as authorities on weight-loss drugs, often without providing complete picture of the hazards

# Weight-Loss Drugs Can Increase Suicidal Thoughts

Potential links between the popularity of weight-loss drugs and reports of suicidal and self-harm

# OZEMPIC OR BUST

America has been trying to address the obesity epidemic for four decades now. So far, each new "solution" has failed to live up to its early promise.

By Daniel Engber

# There's No Easy Way to Stop Taking

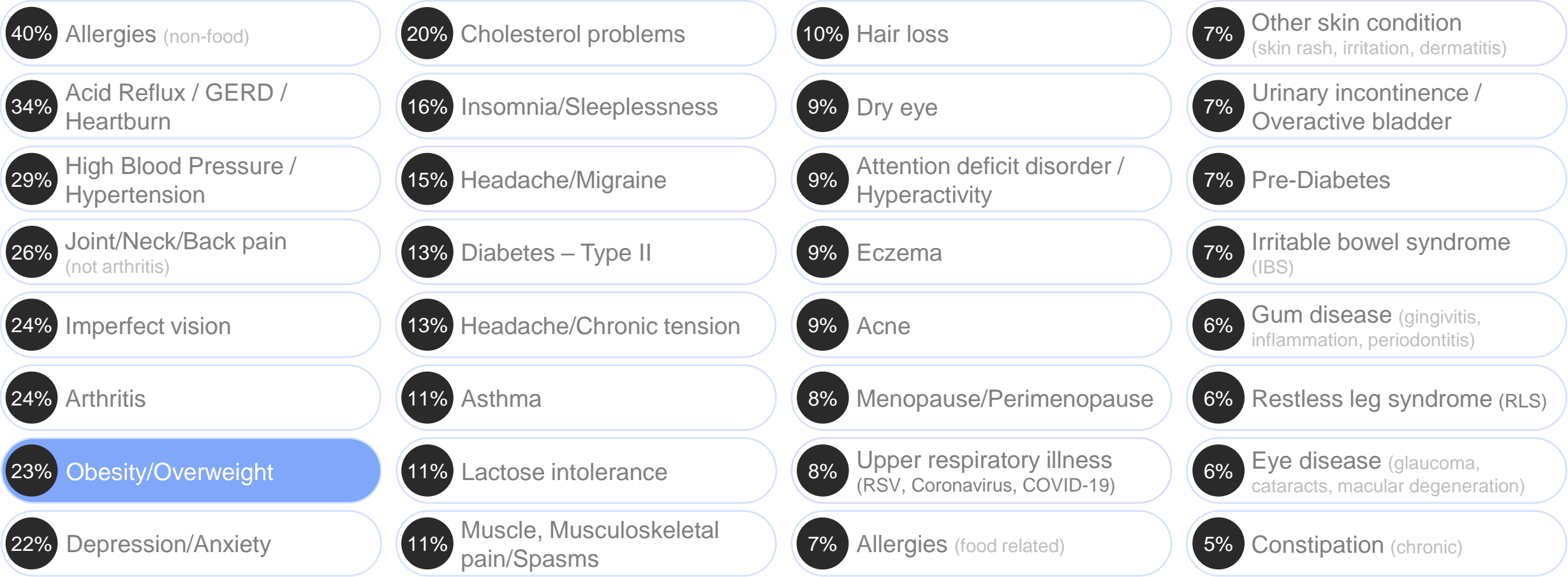
Weight loss drugs risk regaining weight, but staying on them is a realistic option

# A New Match for Menopausal Weight Gain: Ozempic

Weight gain is one of the most common concerns among women going through menopause. New drugs could change that

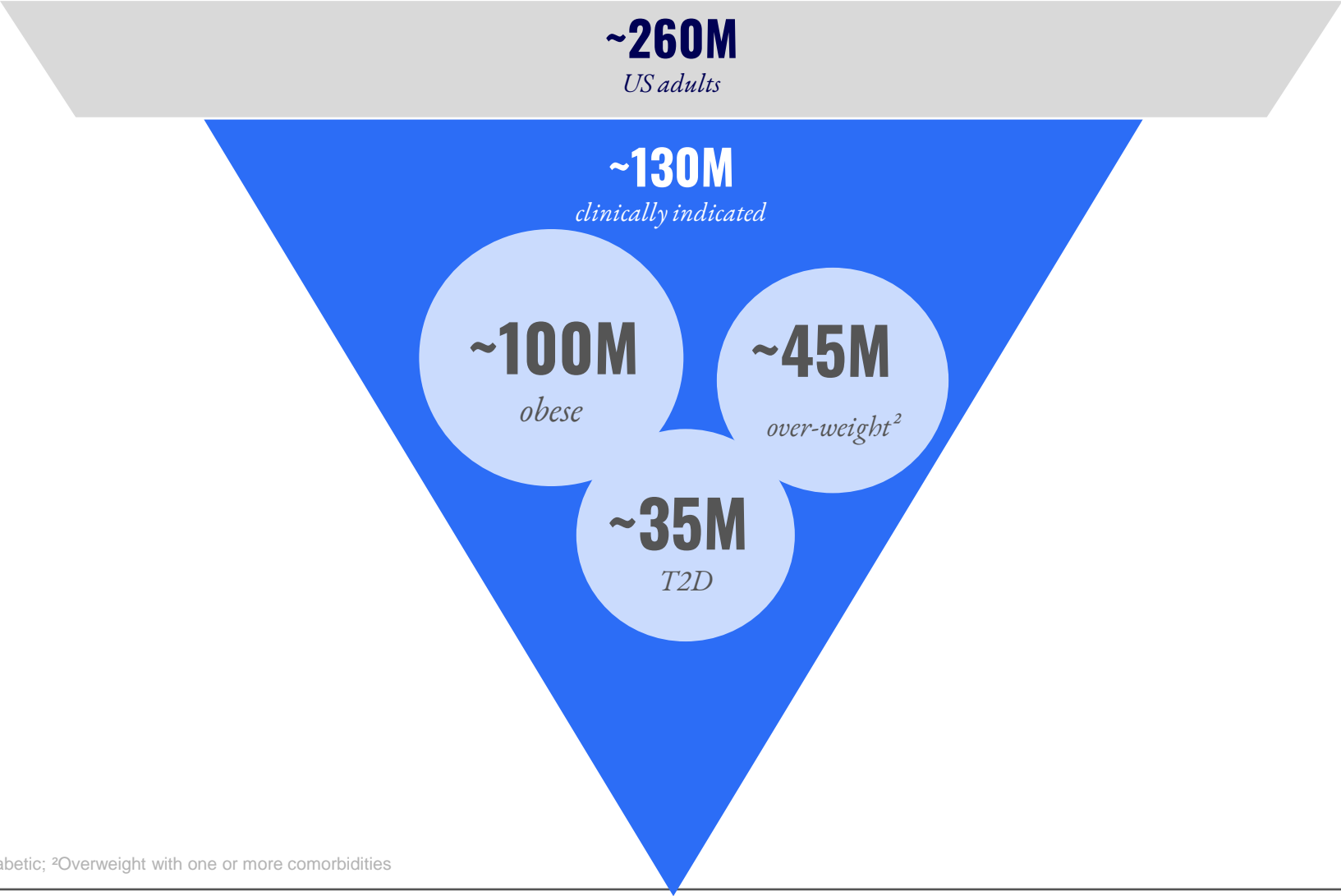
# Obesity/overweight is one of the top consumer household self-reported health conditions

Percent of household in NIQ Consumer Panel reporting conditions in 2024



Source: NIQ Annual Shopper Health Study, 2024, Q. Below is a list of health-related conditions / ailments. Please read the list carefully and then select the condition(s) that anyone in your household, including yourself, has experienced during the past 6 months. Please select all that apply

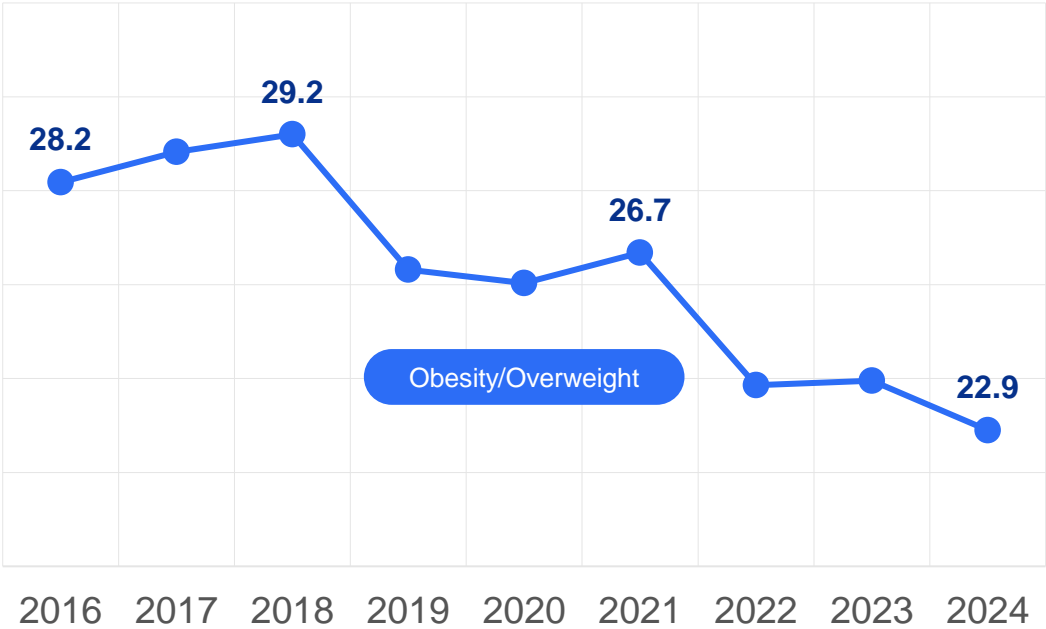
# The market is large



Source: Centers for Disease Control  
Note: <sup>1</sup>Defined as overweight/obese/diabetic; <sup>2</sup>Overweight with one or more comorbidities

# Households with self-reported obesity/overweight is surprisingly declining but those households also have higher likelihood to report other ailments

Percent of NIQ Panel self-reporting household members with Overweight/Obese condition



Households reporting obesity/overweight conditions are **2-3 times more likely** to also report the following health conditions:

- Pre-diabetes
- Urinary incontinence/overactive bladder
- Type II Diabetes
- Menopause/perimenopause
- Restless leg syndrome
- Irritable bowel syndrome
- Gum disease
- Hair loss

61% were diagnosed by a health professional

66% having been diagnosed more than 5 years ago

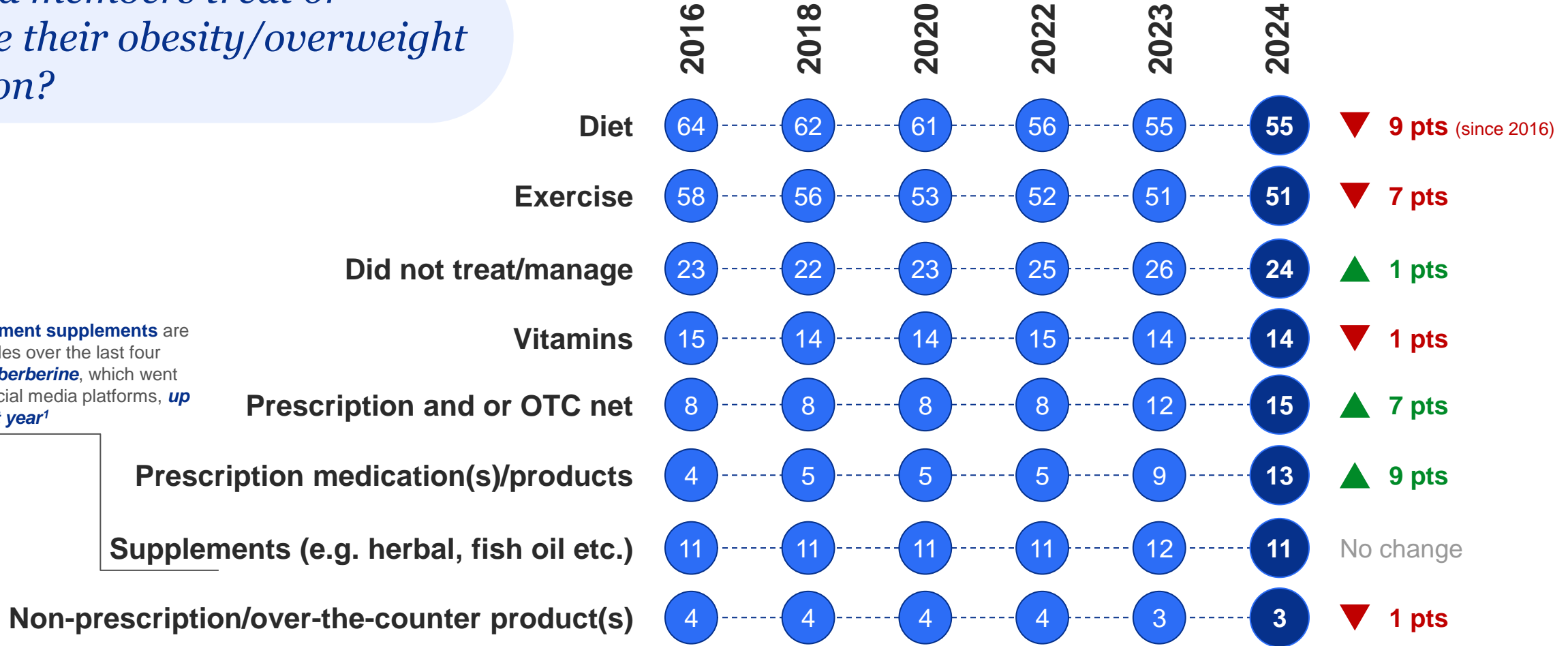
Source: NIQ Health Shopper Survey – 2016 to 2024; Q: Select the condition(s)/ailment(s) that anyone in your household, including yourself, has experienced during the past 6 months. Please select all that apply.

# Treatment and management has shifted over time

Percent of households self-reporting how they treat/manage obesity/overweight condition

*How did members treat or manage their obesity/overweight condition?*

Weight management supplements are down -10% in sales over the last four years, however, **berberine**, which went viral on many social media platforms, **up 438% in the last year**<sup>1</sup>



Source: NIQ Health Shopper Survey, 2016 to 2024; Q. What influenced the decision for you/your household member to treat or manage the [ailment] in the ways mentioned? Select all that apply.



















1 – Source: NIQ, Retail Measurement Services; Total US xAOC; Total Supplements; \$ % Change vs year ago; 52 week ending June 15, 2024


# Today's GLP-1 Players

- GLP-1s work through multiple pathways, influencing **hunger** and **taste perception**, making them more effective than many past AOMs

- NIQ consumer panel research

- **Ozempic** has largest share of GLP-1 users followed by
- **Mounjaro**
- **Trulicity**
- **Wegovy**
- **Generic/Compound**

	DOSAGE	DOSAGE FORM	APPROVED FOR	WHO CAN TAKE IT?	OTHER BENEFITS
<b>Ozempic</b> (SEMAGLUTIDE)	1 WEEKLY		TYPE 2 DIABETES	 ADULTS	HEART, KIDNEYS, WEIGHT LOSS
<b>Rybelsus</b> (SEMAGLUTIDE)	1 DAILY		TYPE 2 DIABETES	 ADULTS	WEIGHT LOSS
<b>Wegovy</b> (SEMAGLUTIDE)	1 WEEKLY		WEIGHT LOSS	12+  KIDS + ADULTS	N/A
<b>Trulicity</b> (DULAGLUTIDE)	1 WEEKLY		TYPE 2 DIABETES	10+  KIDS + ADULTS	HEART, KIDNEYS, WEIGHT LOSS
<b>Victoza</b> (LIRAGLUTIDE)	1 DAILY		TYPE 2 DIABETES	10+  KIDS + ADULTS	HEART, KIDNEYS, WEIGHT LOSS
<b>Saxenda</b> (LIRAGLUTIDE)	1 DAILY		WEIGHT LOSS	12+  KIDS + ADULTS	N/A
<b>Byetta</b> (EXENATIDE)	2 DAILY		TYPE 2 DIABETES	 ADULTS	WEIGHT LOSS
<b>Bydureon BCise</b> (EXENATIDE)	1 WEEKLY		TYPE 2 DIABETES	10+  KIDS + ADULTS	WEIGHT LOSS
<b>Mounjaro</b> (TIRZEPATIDE)	1 WEEKLY		TYPE 2 DIABETES	 ADULTS	WEIGHT LOSS



## What's next...

*An Ozempic rival is getting closer to market — and it's hurting Novo Nordisk and Eli Lilly stock* Stock in Viking Therapeutics, the maker of the new treatment, soared almost 40% - Quartz, July 25, 2024

*AstraZeneca Says Obesity Pill Shows Minimal Side Effects in Early Trial* – WSJ, Nov 4 2024

*A new stronger Ozempic is coming. Here's what to know;* Novo Nordisk revealed more about CagriSema, its potential successor to the weight loss drug Ozempic – Quartz, Nov 6 2024

*Amgen's weight-loss drug fails to impress in study; shares plunge* – Reuters, Nov 26. 2024

➔ Zepbound, (TIRZEPATIDE), approved 2023, weight loss, SBQ weekly

Source: GoodRx, NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024)

ro

## GLP-1 Supply Tracker

Stay up-to-date on where GLP-1s are in shortage and where folks are having success finding them.



⚡ Individual reported Zepbound shortage in New York, NY 1h ago

Let's help each other track and find GLP-1 supply.

Need supply?  
Tell us and get notified when supply is found

Found supply?  
Share with us and we'll notify patients nearby

I can't find GLP-1s ⚡

I found GLP-1s 👥

ro



## Zepbound

2.5 mg / .5 mL ⚡ 115 recent reports

Available according to the FDA but we're receiving shortage reports

5 mg / .5 mL  
Currently in shortage  
Limited availability through Q2 2024

7.5 mg / .5 mL  
Currently in shortage  
Limited availability through Q2 2024

10 mg / .5 mL  
Currently in shortage  
Limited availability through Q2 2024

12.5 mg / .5 mL  
Currently in shortage  
Limited availability through Q2 2024

15 mg / .5 mL  
Currently in shortage  
Limited availability through Q2 2024

←

×

## Submit a GLP-1 Report

Report Type  
I can't find GLP-1s ⚡

Get notified when supply is found in your area and let the FDA know about the shortage!

10011

Which meds?

Ozempic

Wegovy

Mounjaro

Zepbound

Saxenda or Victoza

Are you an individual or a provider?

Patient

Healthcare Provider


Submit ⚡

Over 50,000 patients | Lowest Prices in the USA | Delivered to your Doorstep | No Insurance Required

## GLP-1 Weight Management

The same active ingredient in popular GLP-1's for only \$250 per Month, Flat-Rate.\*

- No Membership Costs or Hidden Fees
- No Insurance? No problem.
- Supplies always in stock
- 24/7 Customer Service
- HSA & FSA Eligible
- CA




## NOOM

FOR INDIVIDUALS | FOR ORGANIZATIONS

### Weight loss medication, the right way, with Noom


FSA & HSA eligible

- GLP-1 meds shipped to you in 7 days, starting at just \$149, if prescribed\*
- Lose 48% more with Noom Med than weight loss medication alone\*



## mochi HEALTH

Home | Pediatrics | About | Medications | Blogs | FAQs | Sign In | Am I Eligible?




### WORK WITH YOUR HORMONES, NOT

hims

## Weight loss personalized to you

Begin your treatment

- Lose weight
- Regrow hair
- Have better sex
- Have longer sex
- Get smooth skin



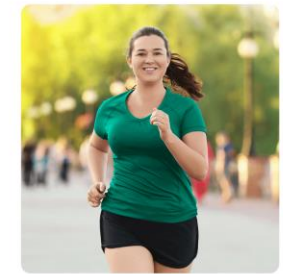
## Henry Semaglutide Prescribed Online

Only \$297 per Month

Get Started

The same active ingredient in the brand name medications

- Includes: Access to a provider, medication & free shipping
- No insurance required
- No hidden fees



### Weight Management Programs by Henry Meds

Compounded Semaglutide	Compounded Oral Semaglutide	Compounded Oral Tirzepatide	Compounded Liraglutide	Phentermine
Get Started	Get Started	Get Started	Get Started	Get Started
\$297 monthly	\$249 monthly	\$349 monthly	\$297 monthly	\$149 monthly

## Alan


Same active ingredient as Ozempic & Wegovy

Weight loss without the wait. Affordable compounded semaglutide injections now available in your state.

Am I eligible?

Find out in under 5 mins with our FREE questionnaire

- Free overnight shipping
- Expert doctor guidance
- Free overnight shipping



## PlushCare

Weight Loss > GLP-1

### GLP-1 medications online

GLP-1 drugs can significantly support weight loss and treat symptoms of type 2 diabetes by mimicking a hormone your body naturally uses to regulate your blood sugar and appetite. Get a new prescription or refill for GLP-1 medications from a board-certified primary care doctor today.\*

- Reduces over-eating and controls appetite
- Clinically proven and effective GLP-1 RXs
- Enhance the body's sugar response

Book an appointment

## SESAME

Urgent care | Weight loss | Refer a friend | Partner with us

Symptom, service, doctor name, special...

## eden

weight loss | energy+mood | cardio+strength

Black Friday Deals with Eden, Unlock the New You, Today!

Prescription weight loss tailored to your needs

Join tens of thousands who have already lost weight with Eden

Get Started

## Ro

### GLP-1 Supply Tracker

Introducing Ro's GLP1 Supply Tracker.

Over the last few weekends, a few Ro'sers built a GLP1 Supply Tracker to fill the gap that our patients and providers are currently struggling with -- finding out which GLP1s are available (and where) and which aren't. We originally started building this tool to make life easier for our own patients. We always prioritize building for Ro'sers for their health care and deserve our singular focus. About it, the more we realized that the tool works better for Ro'sers (our patients) the greater the number of people that

Reset your metabolism and burn more calories\*

Stop food noise and reduce cravings

Get the help you need maintaining weight loss

## WeightWatchers

Overview | News | Events & Presentations | Stock Info | Financials | Governance | Resources

### News Details

View All News

#### WeightWatchers Adds Compounded GLP-1, Expanding Accessibility and Affordability of Weight Loss Medications

October 8, 2024

## Join 1,500,000+ FuturHealth weight loss patients

### Weight loss made easy with a prescription to tirzepatide

- Lose up to 1.5% of your body fat per week\*
- Get access to Zepbound®, tirzepatide and other great weight loss medications
- Get approved with this 3-min quiz, no insurance needed

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[FDA clarifies policies for compounders as national GLP-1 supply begins to stabilize](#)

## FDA clarifies policies for compounders as national GLP-1 supply begins to stabilize

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**[10/22/2024]** As part of litigation, the decision to remove tirzepatide from the FDA drug shortage list has been remanded to the agency for reevaluation. FDA sent a [letter](#) on October 17, 2024, in response to a question regarding the agency's intended approach to the compounding of tirzepatide drug products during the reevaluation period.

**[10/02/2024]** The U.S. Food and Drug Administration has determined the shortage of tirzepatide injection, a glucagon-like peptide 1 (GLP-1) medication, [has been resolved](#). Tirzepatide injection has been in shortage since 2022 due to increased demand.

FDA confirmed with the drug's manufacturer that their stated product availability and manufacturing capacity can meet the present and projected national demand. Patients and prescribers may still see intermittent localized supply disruptions as the products move through the supply chain from the manufacturer and distributors to local pharmacies.

**FDA reminds compounders of the legal restrictions on making copies of FDA-approved drugs**

BUSINESS NEWS

## Stop selling off-brand weight loss drugs, Eli Lilly warns companies

The pharma giant is targeting providers who are promoting compounded versions of tirzepatide — the active ingredient in Zepbound and Mounjaro

By **Bruce Gil** Published August 14, 2024



NBC NEWS

Compounding pharmacies can resume making tirzepatide as FDA reconsiders shortage

SHARE & SAVE



HEALTH NEWS

## Compounding pharmacies can resume making tirzepatide as FDA reconsiders shortage

The FDA's move was in response to a...  
tirzepatide — the ingredient in Zepbound



HEALTH AND SCIENCE

## Novo Nordisk asks FDA to ban compounding pharmacies from making Ozempic, Wegovy copies

PUBLISHED WED, OCT 23 2024 9:44 AM EDT | UPDATED WED, OCT 23 2024 1:52 PM EDT

**Annika Kim Constantino**  
@ANNIKAKIMC

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# Retailers engaged in GLP-1



Get Started GLP-1 Rx Drug Options GLP-1 Nutrient Support GLP-1 101 FAQs

## Modern Weight Loss Meets Whole-Body Health

An effective weight-management program—coupled with nutritional support—is right within arm's reach. Take a short questionnaire to see if you qualify for breakthrough GLP-1 Rx medications.

- ✓ No insurance required
- ✓ No cancellation fee
- ✓ Prescribed by experienced healthcare professionals
- ✓ Choice of 4 different brand name GLP-1 FDA-approved Rx medications (Ozempic®, Mounjaro®, Zepbound®, Wegovy®) and 3 compounded injectable or orally dissolving Rx meds (semaglutide and tirzepatide)

GET STARTED

INTRODUCTORY OFFER  
As Low As \$199



GLP-1 receptor agonists—including Ozempic®, Mounjaro®, Zepbound®, Wegovy®, Semaglutide, and Tirzepatide—have been prescribed (on and off label) for weight management, including obesity, along with a reduced caloric diet and increased physical activity. Ozempic® and Mounjaro® are FDA-approved for type 2 diabetes treatment, but may be prescribed off-label for weight loss at a healthcare provider's discretion. Take precaution with, and read all warnings concerning, GLP-1s, as they may cause serious side effects, including a risk of thyroid C-cell tumors. Do not use if you or your family have a history of a type of thyroid cancer called MTC (medullary thyroid carcinoma) or MEN 2 (multiple endocrine neoplasia syndrome). See important warnings & safety info about these medications. As an alternative to FDA-approved branded products, where appropriate, a provider may prescribe a GLP-1 compounded drug that is effective when prescribed off label for weight loss, which is prepared by a state-licensed sterile compounding pharmacy partner. Although GLP-1 compounded drugs are permitted to be prescribed under federal law, they are not FDA-approved and do not undergo safety, effectiveness, or manufacturing review. Thoroughly review all warnings and essential safety information regarding these drugs. See important safety information.



World US Election Business Markets Sustainability Legal Breakingviews Technology More

Healthcare & Pharmaceuticals

## Costco offering members access to weight-loss programs including medication

By Reuters

April 3, 2024 2:11 PM CDT · Updated 8 months ago



World US Election Business Markets Sustainability Legal Breakingviews Technology

Healthcare & Pharmaceuticals

## Kroger Health revamps weight management program to include GLP-1 drugs

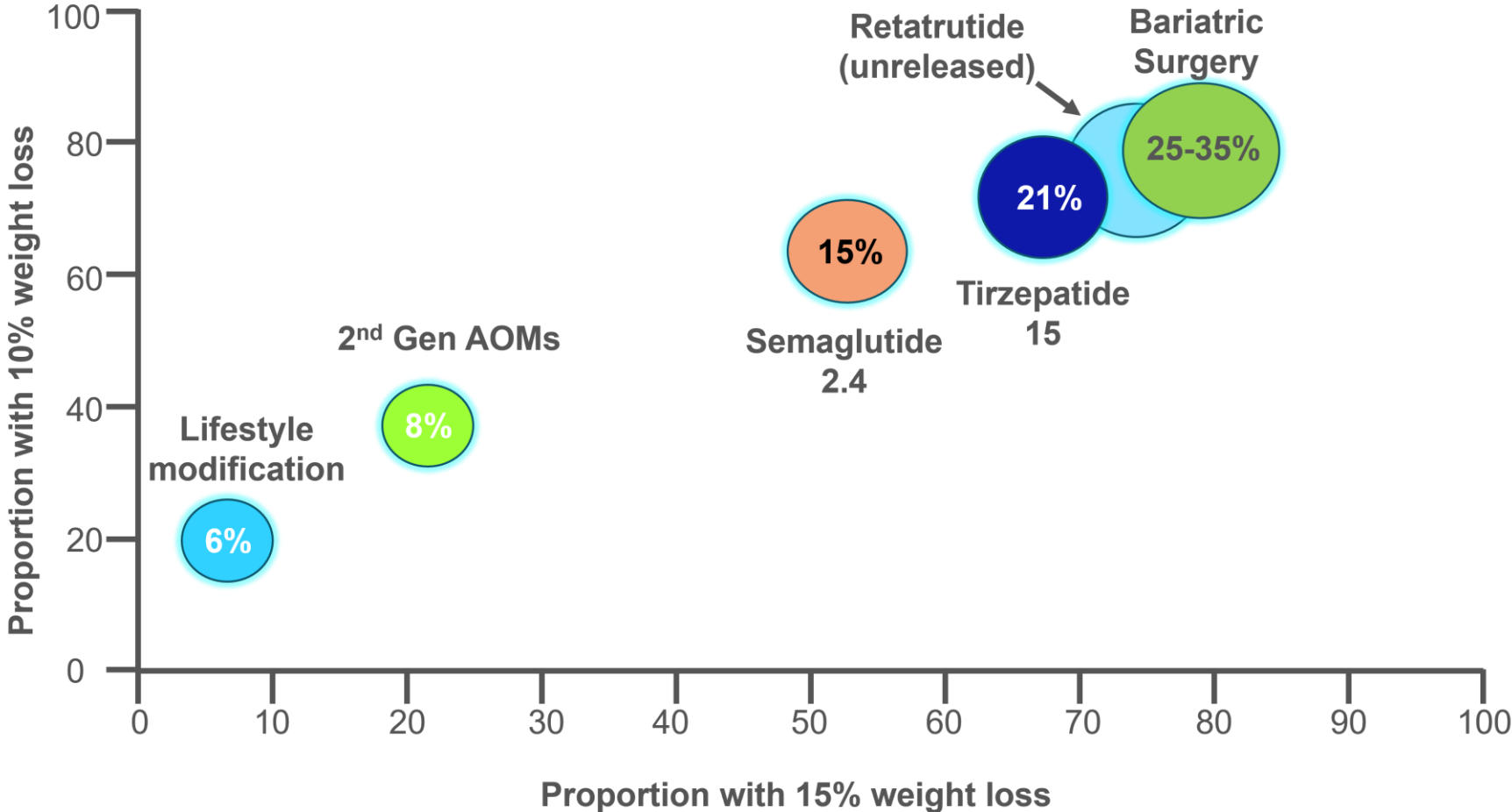
By Reuters

June 7, 2024 10:25 AM CDT · Updated 6 months ago



# How Effective are GLP-1 Agonists?

Relative to other known interventions

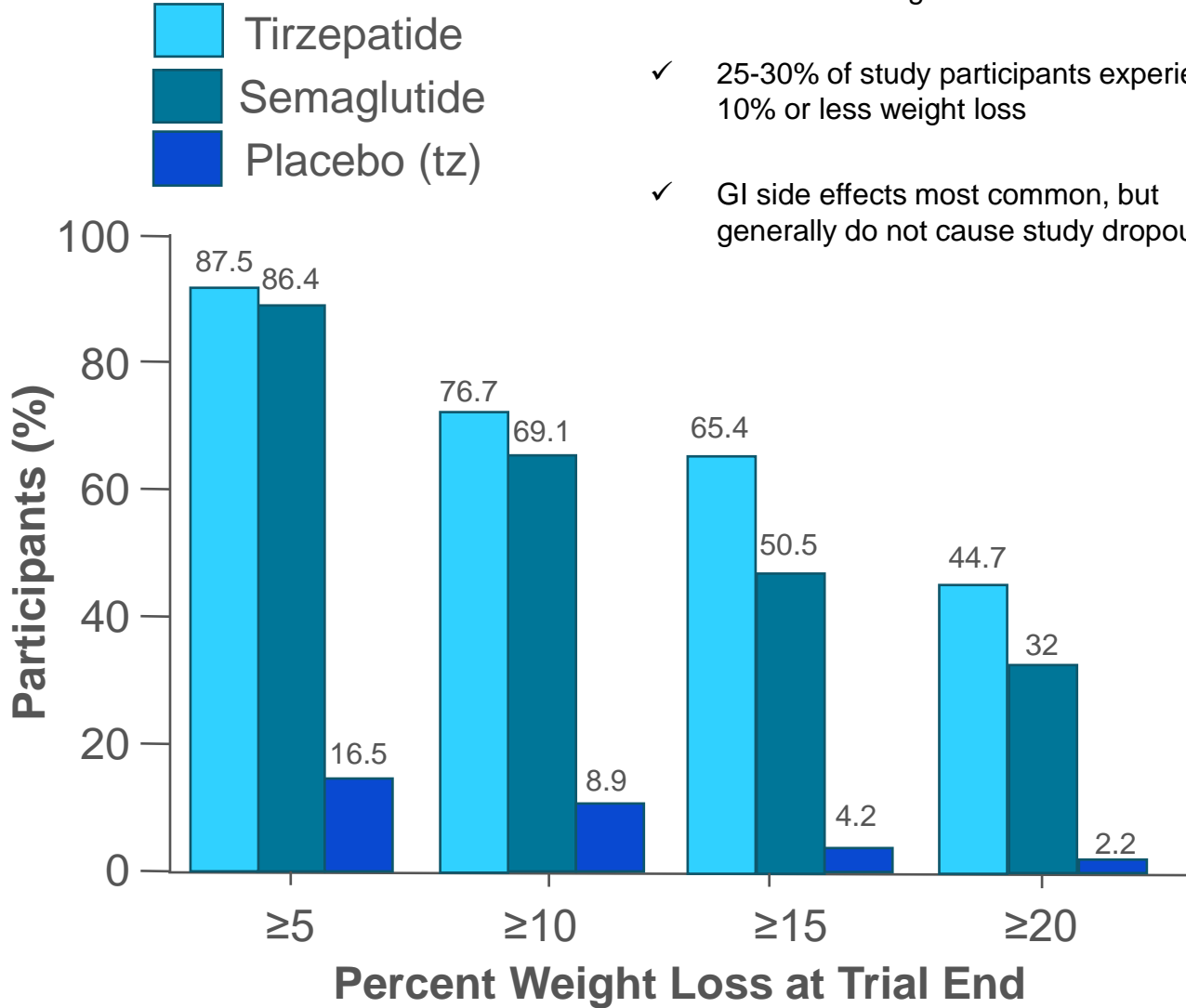


These new medications are able to drive substantial weight loss in patients

*Next focus:*  
*Quality of weight loss*

# A Deeper Dive Into Clinical Outcomes

## Weight Loss at Trial End



- ✓ 10-15% of study participants experience 5% or less weight loss
- ✓ 25-30% of study participants experience 10% or less weight loss
- ✓ GI side effects most common, but generally do not cause study dropouts

	Placebo (%) SURMOUNT 1	Semaglutide (%) STEP 1	Tirzepatide (%) SURMOUNT 1
Nausea	10	44	31
Diarrhea	7	30	23
Constipation	6	23	12
Dyspepsia	4	9	11
Vomiting	2	24	12
Headache	7	15	7
Alopecia	1	3	6
Eructation	<1	7	6
Dizziness	4	8	4
Fatigue	5	11	NR

# Usage lapse indicates challenges and potential opportunities

Average days on prescription lower for GLP-1 for obesity, not diabetic<sup>1</sup>

	Obese NOT Diabetic	Obese AND Diabetic
Avg. Days	673.0	776.5



NIQ survey<sup>2</sup> found...

- *Too expensive* is top reason panelists have stopped using prescription injections for diabetes or weight loss.
- *No longer have diabetes* and *lost weight needed* top reason for lapsed usage as well.
- Followed by *side effects* (experiencing, concern over)
- *Using a different approach to losing weight* higher than *have plateaued, not able to lose any more weight* also reasons for stopping injections

1 – Source: Management Science Associates

2 – Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024) – Q13. What are the reasons you or others in your household have stopped using prescription injections for diabetes or weight loss? Please select all that apply.

# What we know today...

## *A Whole New Ballgame*

- GLP-1s work through multiple pathways, influencing hunger and taste perception, making them more effective than many past AOMs

## *Not a Homogenous Response* and GLP-1 drugs not as cost-effective compared to lifestyle-based interventions

- The GLP-1 medications do not work for everyone, with ~30% of study participants not losing >10% of body weight on semaglutide and ~25% not losing >10% on tirzepatide
- The majority of GLP-1 users are female, especially for non-T2Ds weight loss, furthermore women tend to lose more weight on GLP-1s over the course of a year

## *Significant side effects* for some consumers, particularly those newly on the drugs and those taking higher doses

- Side effects include lean body mass loss (upwards of 40% lean mass loss on GLP-1s versus 25% with traditional weight loss), nausea, diarrhea, vomiting, constipation, abdominal pain, heart burn, dehydration, and for some, serious side effects like pancreatitis and bowel obstructions.

## *Long-term Usage*

- Weight loss plateaus about 1 yr post treatment, and without chronic therapy, it appears participants regain a major portion of the lost weight; potential impact of cycling

## *Cost*

- Hefty price tag, can cost more than \$10K per year

# NIQ approach to understanding GLP-1 impact

Since 2016, NielsenIQ tracks health conditions annually in our **NIQ Health Shopper Survey**

Nov/Dec 2023  
**GLP-1 Survey**

February/March 2024  
**GLP-1 Survey**

August/Sept 2024  
**GLP-1 Survey**

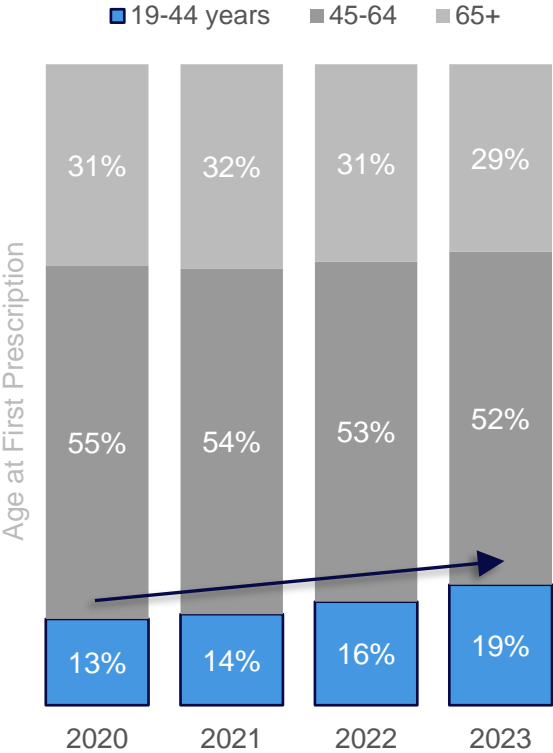


Partnership with **Management Science Associates** to measure electronic medical records (MSA has a multi-patented de-identification and matching technology; HIPAA compliant)

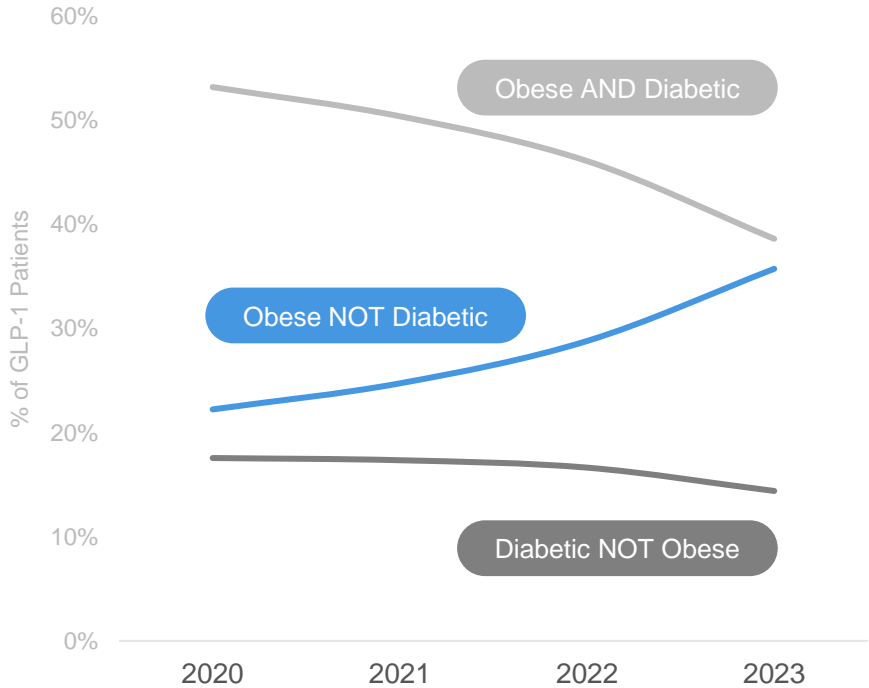
- **National consumer purchase panel data**
  - Approximately **330,000 lives**
- **Lab test results (e.g., HbA1C and cholesterol)**
  - Approximately **200 million lives**
- **Electronic health records (e.g., GLP-1 Medications)**
  - Approximately **80 million lives**
- **Client first party data**

# GLP-1 for weight loss is on the rise, indicating opportunity to segment shoppers

## Age at first prescription is trending younger<sup>1</sup>



## Obese, Non-Diabetic GLP-1 users are trending up<sup>1</sup>



## NIQ GLP-1 segmentation<sup>2</sup>

### Segment by treatment start date

- Started GLP-1 1-3 months ago
- Started GLP-1 4-6 months ago
- Started GLP-1 7-11 months ago

### Segment by purpose

(weight loss, diabetes or both)

- 48% of GLP-1 are diabetes only
- 31% of GLP-1 are for weight-loss only
- 19% of GLP-1 are both diabetes *and* weight loss



Source: MSA through integration of NCP and EMR data, Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 13 weeks ending September 28, 2024

# Varying consumer need states create distinct GLP1 user groups

GLP-1 consumer varies based on usage; newest GLP-1 weight loss users trending younger

## GLP-1 Only Diabetes



**58%** age 55-74  
(Index **163**)



**81%** have no children  
(Index **116**)



**36%** HH income <\$50K  
(Index **107**)

## GLP-1 for Weight Loss



**23.4%** age 45-54  
(Index **139**)



**21%** kids aged 6-17  
(Index **116**)



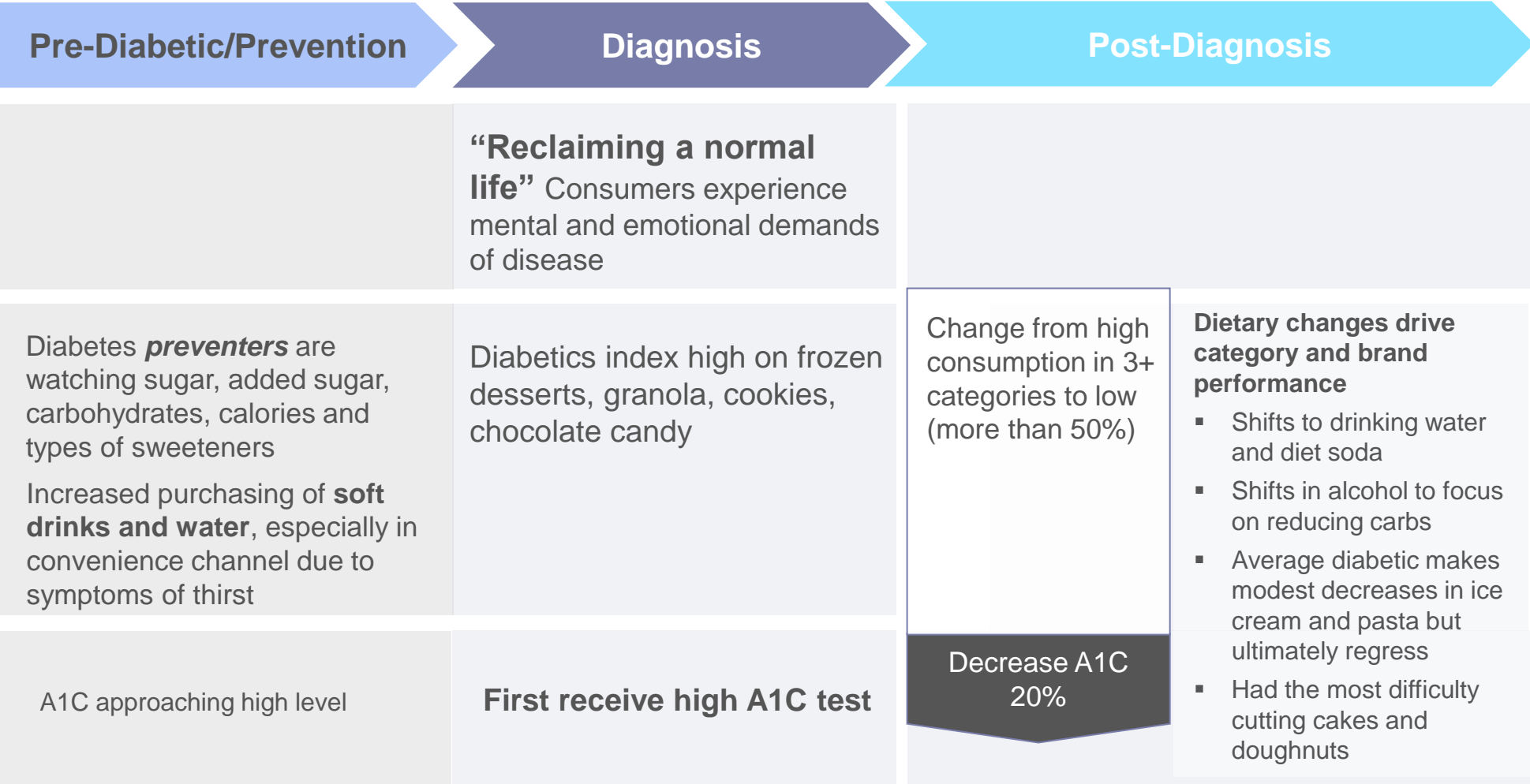
**29%** HH income \$150K+  
(Index **143**)

## GLP-1 for Weight Loss, Started 1-3 months ago

*Trending younger with  
younger children with  
income under \$100K*

# Past work in diabetes patient journey informed need for expanded perspective

Understanding attitudes and behavior pre and post diagnosis

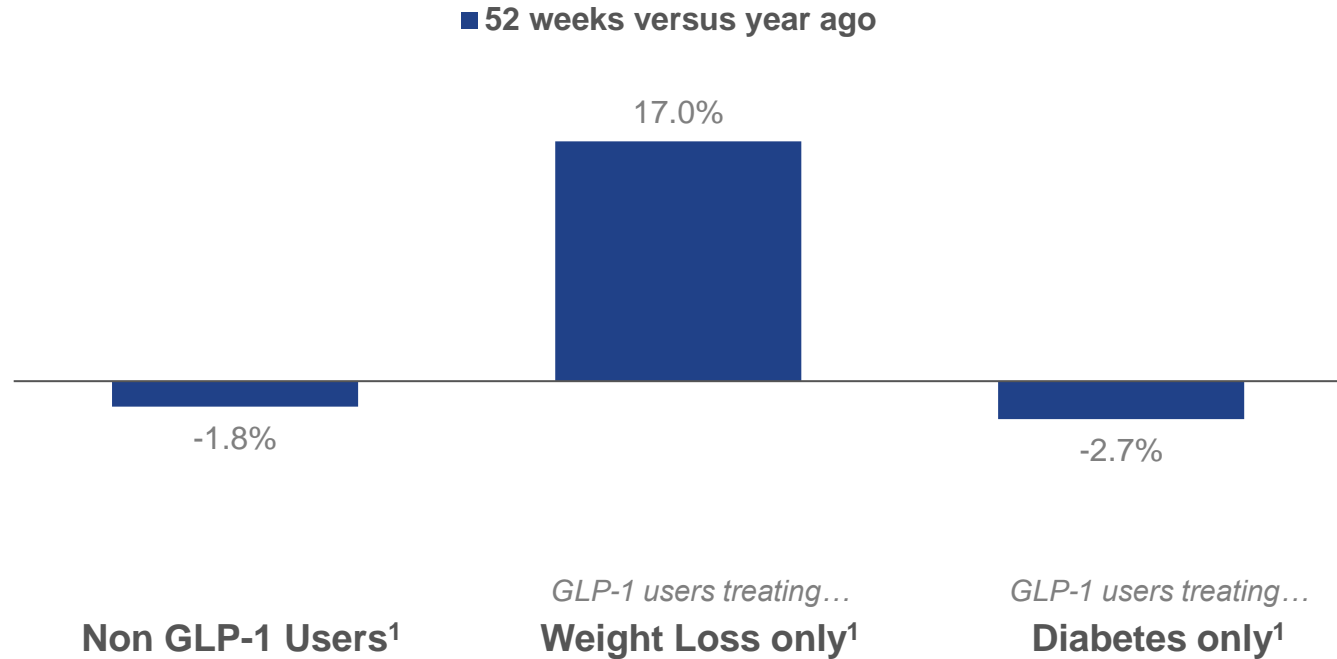


Sources: Motivbase, Management Science Associates + NielsenIQ Homescan Panel, NielsenIQ Product Insight

# Overall, shoppers on GLP-1 for weight loss *increase* volume

## Unit Volume % Chg.

Compared to prior year



Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 52 weeks ending September 28, 2024

<sup>1</sup> – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.

# GLP-1 users for weight loss tend to spend more in the store, especially early in journey

## TOTAL STORE | Unit Volume % Chg. by GLP-1 User Group

When households started taking a GLP-1 prescription<sup>2</sup>

■ 1-3 months ago (vs prior 13 wks) ■ 1-3 months ago (vs 13 wks YA) ■ 4-6 months ago (vs 13 wks YA) ■ 7-11 months ago (vs 13 wks YA)



Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 13 weeks ending September 28, 2024

1 – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.

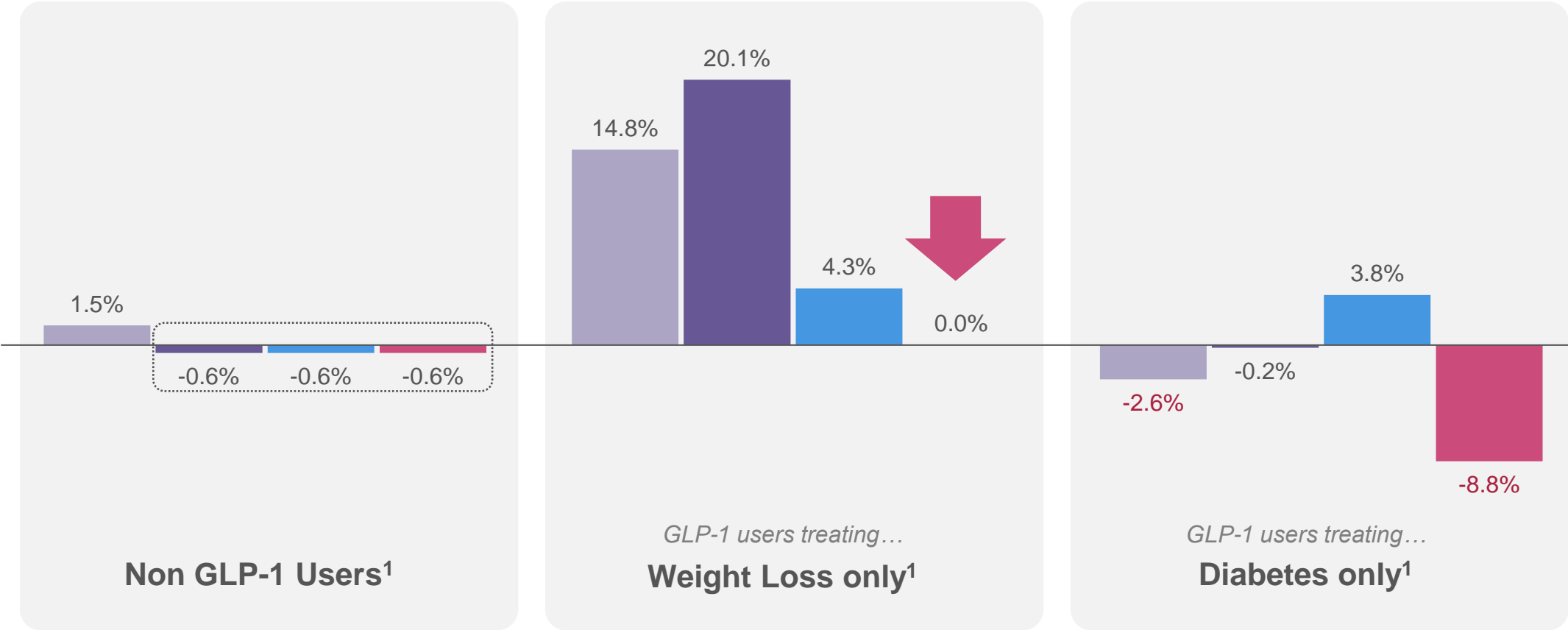
2 – Q12. When did the first person in your household start using one of these prescription injections for the first time? (and currently using the injections)

# Food and Beverage looks similar, except latest 13 weeks flat for long term GLP-1 weight loss

## FOOD & BEVERAGE | Unit Volume % Chg. by GLP-1 User Group

When households started taking a GLP-1 prescription<sup>2</sup>

■ 1-3 months ago (vs prior 13 wks) ■ 1-3 months ago (vs 13 wks YA) ■ 4-6 months ago (vs 13 wks YA) ■ 7-11 months ago (vs 13 wks YA)



Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Food & Beverage; Unit % Change, 13 weeks ending September 28, 2024

1 – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.

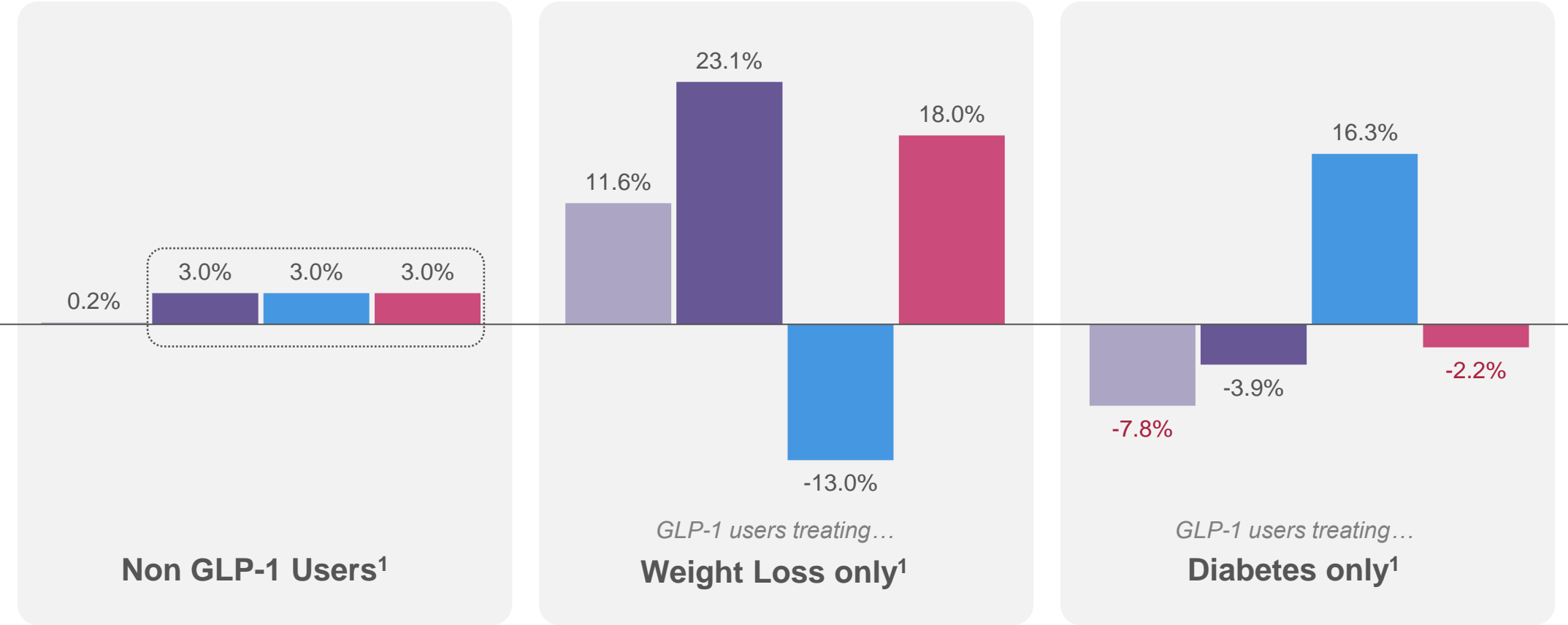
2 – Q12. When did the first person in your household start using one of these prescription injections for the first time? (and currently using the injections)

# For GLP-1 weight loss, those starting 4-6 months ago see declines in HBC

## HEALTH & BEAUTY CARE | Unit Volume % Chg. by GLP-1 User Group

When households started taking a GLP-1 prescription<sup>2</sup>

■ 1-3 months ago (vs prior 13 wks) ■ 1-3 months ago (vs 13 wks YA) ■ 4-6 months ago (vs 13 wks YA) ■ 7-11 months ago (vs 13 wks YA)



Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Health & Beauty Care; Unit % Change, 13 weeks ending September 28, 2024

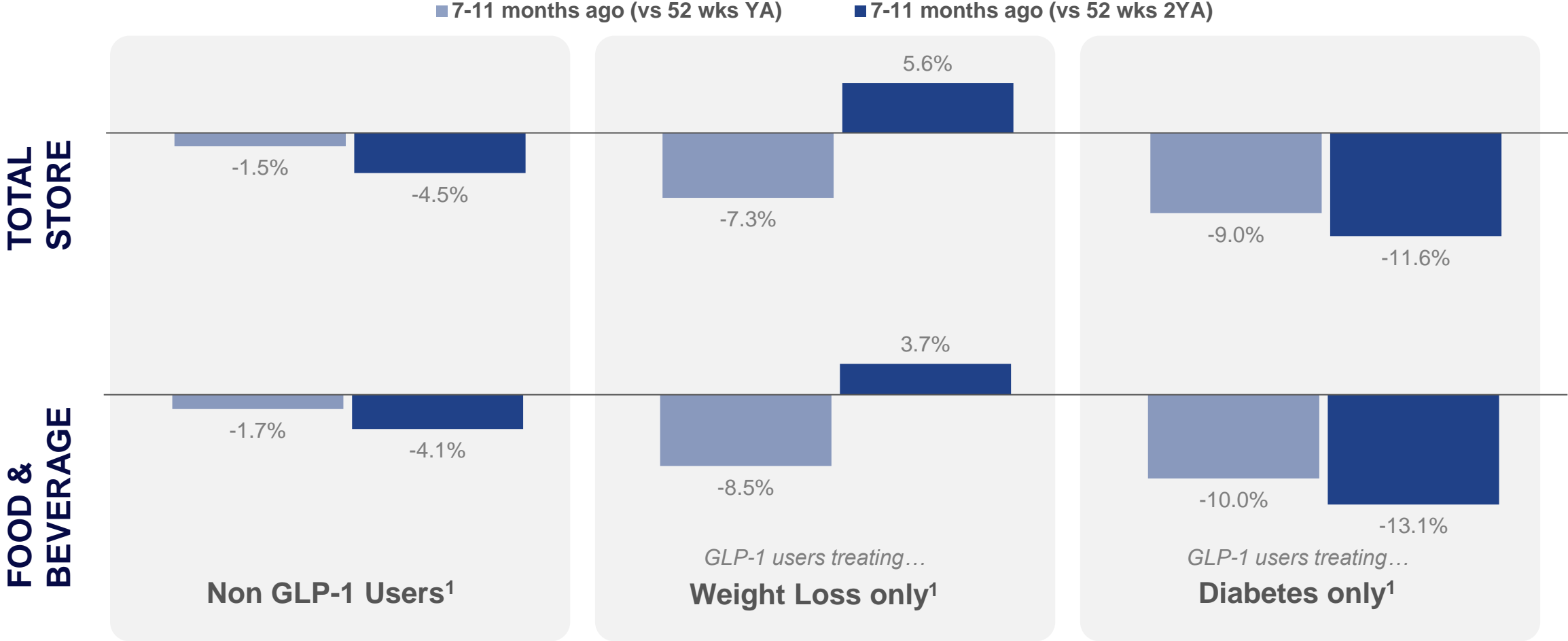
1 – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.

2 – Q12. When did the first person in your household start using one of these prescription injections for the first time? (and currently using the injections)

# Longer view illustrates value of the GLP-1 for weight loss shoppers

Unit Volume % Chg. by *GLP-1 User Group*

When households started taking a GLP-1 prescription<sup>2</sup>



Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 52 weeks ending September 28, 2024

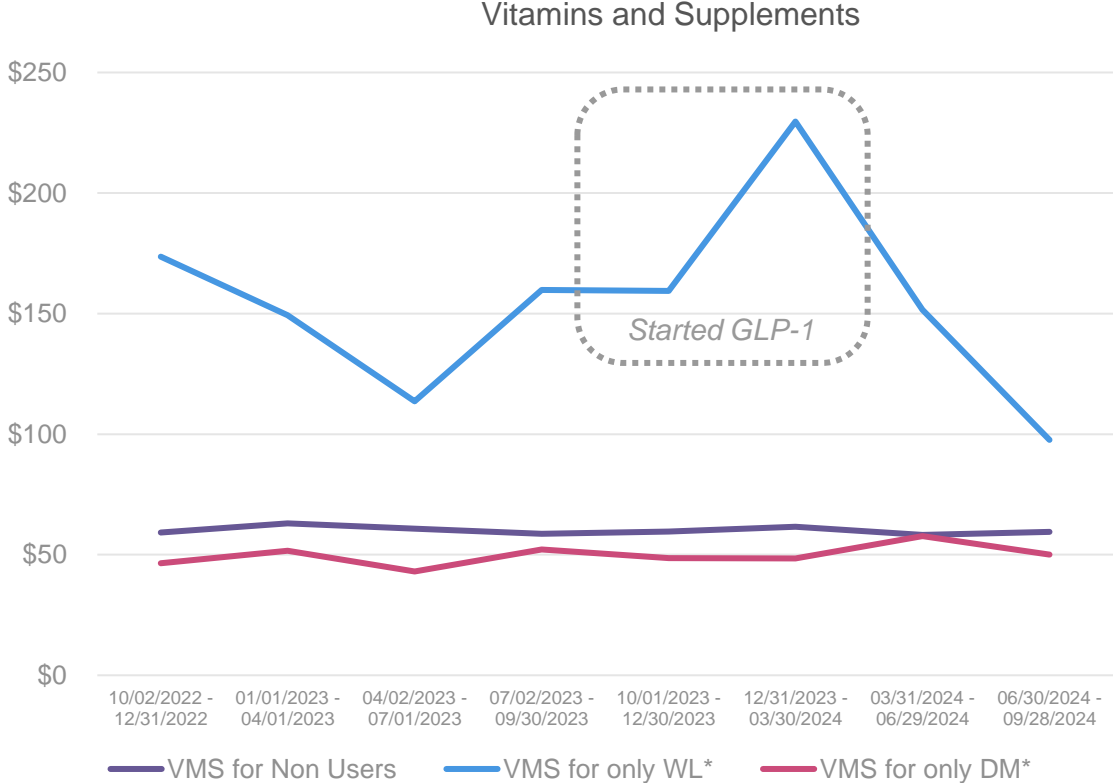
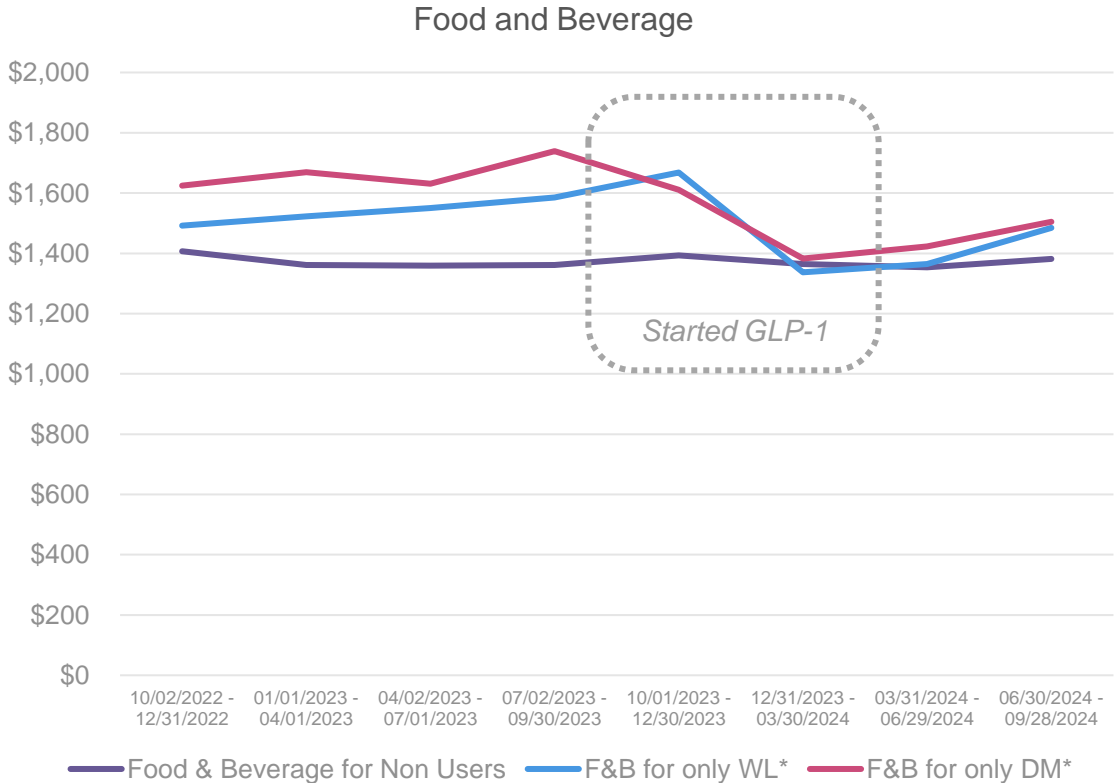
1 – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.

2 – Q12. When did the first person in your household start using one of these prescription injections for the first time? (and currently using the injections)

# Over time, shopping behavior shifts across categories

## GLP-1 Buyers (started 7-11 months ago) compared to Non-Users

Buy rate (\$/buyer) trended over last two years

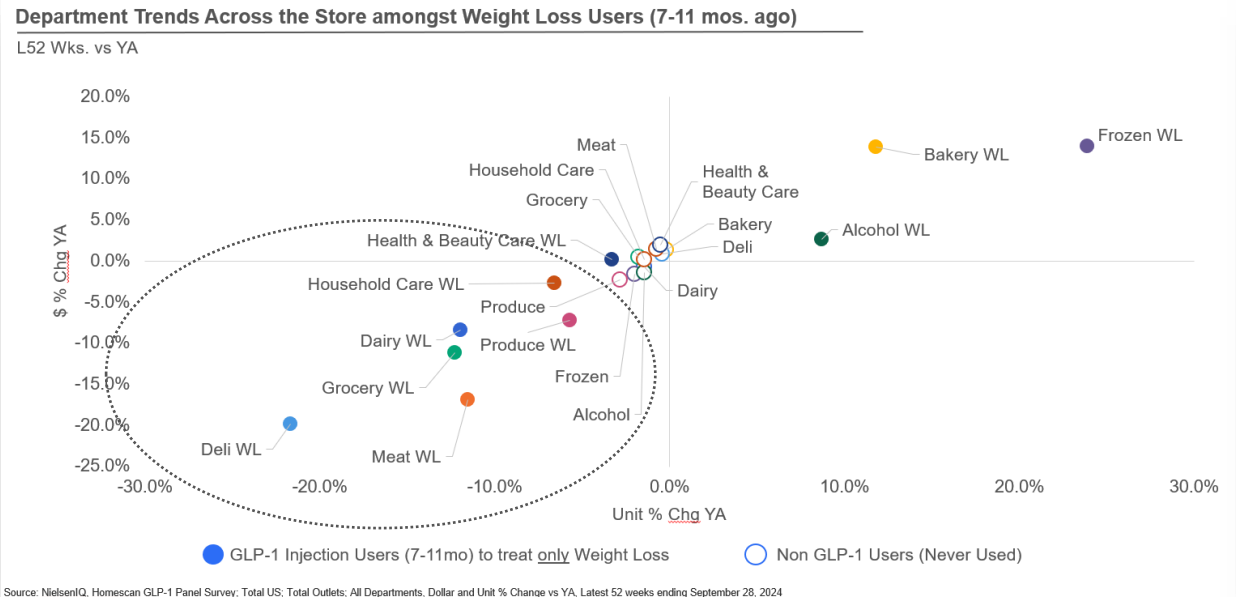


\*WL = Weight Loss; DM = Diabetes Management

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Food & Beverage vs Vitamins, Minerals & Supplements; Unit % Change; Quarterly periods through 13 weeks ending September 28, 2024

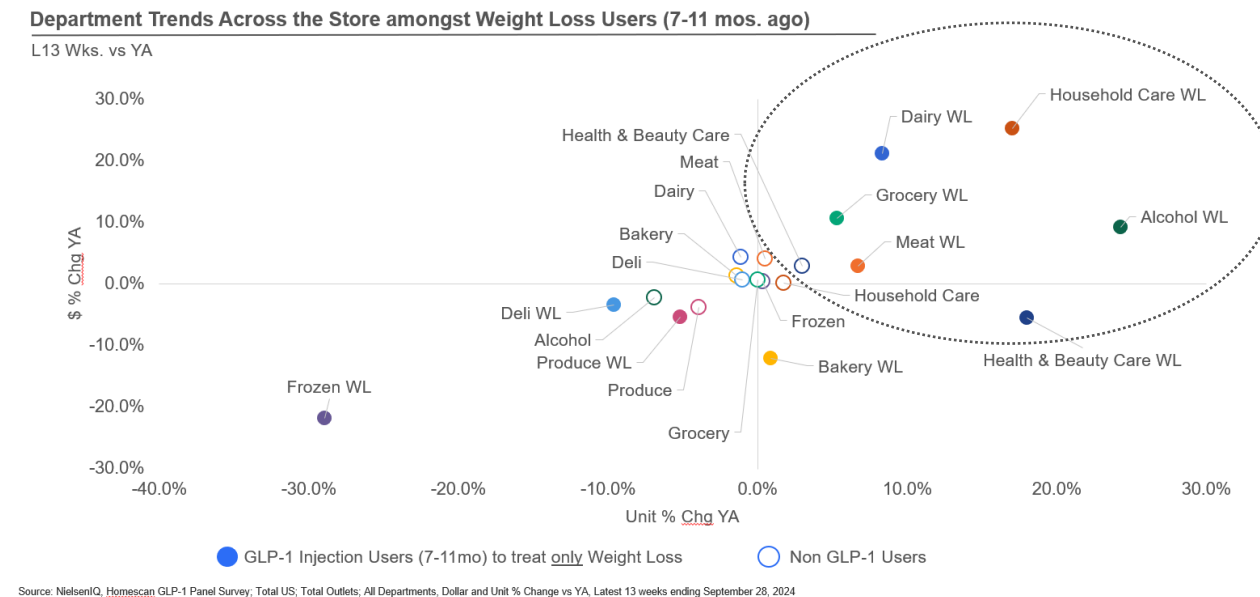
# A look at the shifting behavior of those GLP-1 weight loss shoppers on 7-11 months

## 52 weeks



*Decreases across the board, except for increases in frozen, bakery and alcohol*

## Latest 13 weeks



*Decreases in frozen, produce, deli in latest 13 weeks versus year ago*

\*Survey respondents who stated that someone in their household began taking any of the GLP-1 injection prescriptions 7-11 months ago, with the purpose of only treating weight loss

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco), Dollar and Unit % Change vs YA, 52 vs 13 weeks ending September 28, 2024



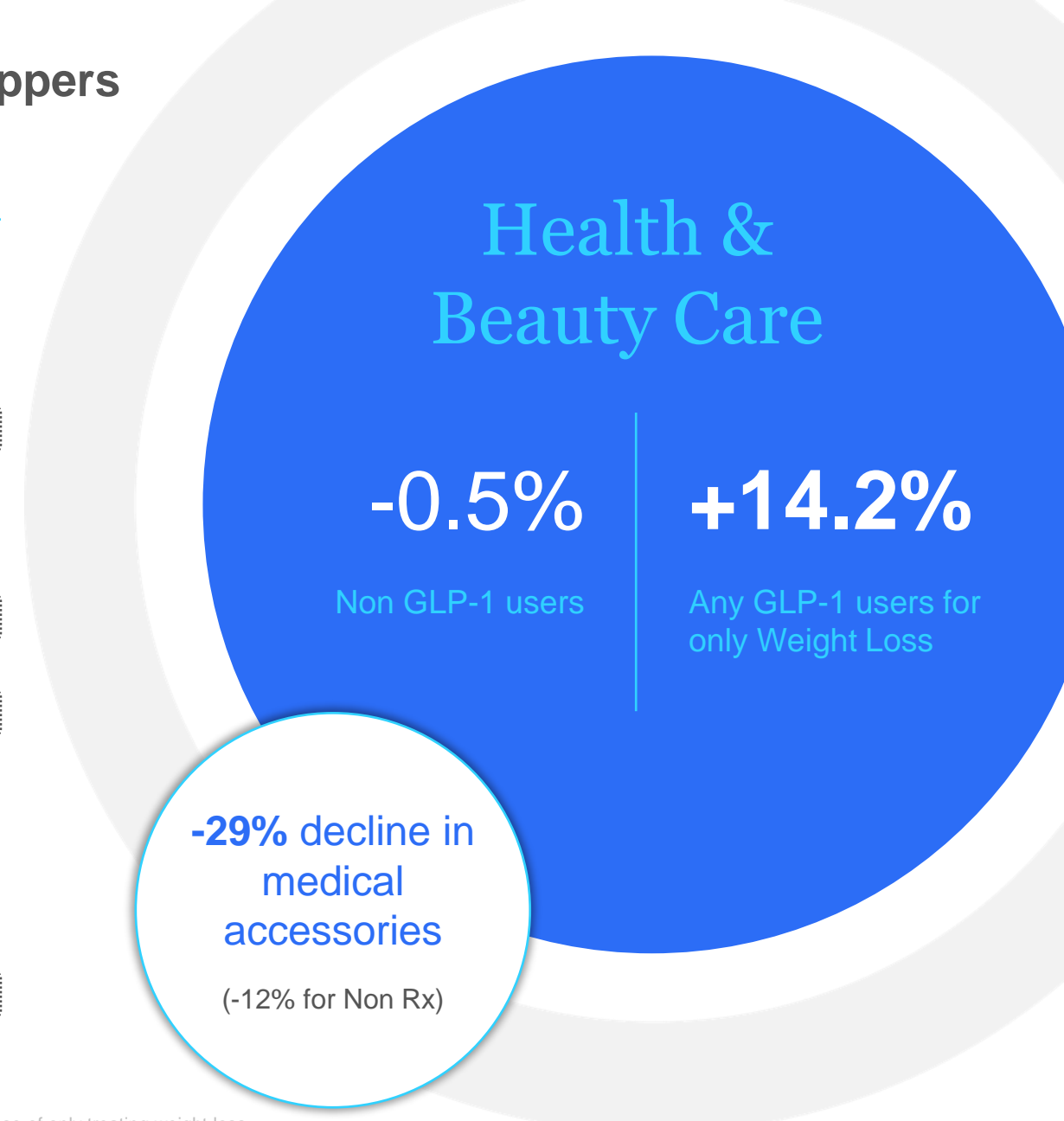
# Linking behavior directly to electronic medical records/GLP-1 start illustrates shifting

Category	Pre 90 Days	Post 90 Days		Post 180 Days		Post 270 Days	
	Volume (per person)	Vol	Vol Chg	Vol	Vol Chg	Vol	Vol Chg
Sports Drinks	220.40	300.95	36.5%	279.67	26.9%	286.69	30.1%
Corn Chips	10.17	7.28	-28.5%	7.57	-25.6%	6.84	-32.8%
Meat Snacks	6.08	7.28	19.8%	7.88	29.5%	10.81	77.9%



# GLP-1 Weight Loss Shoppers are strong HBC shoppers

Department	Category	Non Rx Users	Any GLP-1 for WL*
Health & Beauty	Deodorant	+2.0%	+36.2%
Health & Beauty	Fragrances – Body powder	-8.6%	+22.3%
Health & Beauty	Fragrances – Perfume	-10.0%	+23.4%
Health & Beauty	GI Care	-1.6%	+23.6%
Health & Beauty	GI Care – Anti-Nausea	-9.4%	+77.3%
Health & Beauty	GI Care – Anti-Diarrhea	+17.3%	+47.5%
Health & Beauty	Hair Care	-0.0%	+35.3%
Health & Beauty	Hair Care – Conditioner	-0.1%	+53.2%
Health & Beauty	Hair Care – Hair growth product	-9.7%	+108.4%
Health & Beauty	Oral – Toothpaste	-1.1%	+29.2%
Health & Beauty	Sexual Health – Pregnancy test kit	-19.9%	+148.1%
Health & Beauty	VMS – Vitamins – Vitamin B	+4.9%	+34.6%
Health & Beauty	VMS – Vitamins – Vitamin D	-5.1%	+25.5%
Health & Beauty	VMS – Minerals – Calcium	-12.0%	+21.8%
Health & Beauty	VMS – Minerals – Iron	+7.1%	+62.4%
Health & Beauty	VMS – Supp – Digestive supplement	+1.2%	+46.6%
Health & Beauty	VMS – Supp – Electrolyte supplement	+107.9%	+202.3%
Health & Beauty	VMS – Supp – Sleep Aid supplement	-4.9%	+25.8%



\*Survey respondents who stated that someone in their household began taking any of the GLP-1 injection prescriptions with the purpose of only treating weight loss

Source: NielsenIQ, Homescan GLP-1 Panel Survey; Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco), Dollar and Unit % Change vs YA, Latest 52 weeks ending September 28, 2024

# GLP-1 weight loss shoppers increasing across many categories

Dept	Category	Non GLP-1 Users	Any GLP-1 for WL*
Bakery	Bagels	▼	▲▲
Dairy	Milk Products	▼	▲
Dairy	Cheese	▬	▲
Deli	Beverages	▼	▲▲
Frozen	Desserts	▬	▲
Frozen	Fresh Meat – Beef	▲	▼
Frozen	Fully Cooked – Beef	▼	▲▲
Frozen	Prepared Foods	▼	▲▲
Frozen	Fruit	▼	▲▲▲
Frozen	Vegetables	▼	▬
Grocery	Beverages	▬	▲▲
Grocery	Beverages – Energy Beverages	▬	▲▲▲
Grocery	Beverages – Soft Drinks	▬	▲▲
Grocery	Beverages – Water	▲	▼
Grocery	C/G/M – Chocolate	▼	▲
Grocery	C/G/M – Gum	▼	▲▲
Grocery	Cookies & Crackers	▼	▲
Grocery	Fruit Snacks	▼	▲▲
Grocery	Milk/Dairy Alternative	▼▼	▲▲▲
Grocery	Diet & Nutrition	▲	▲▲

Dept	Category	Non GLP-1 Users	Any GLP-1 for WL*
Grocery	Salty Snacks	▬	▲
Grocery	Salty Snacks – Corn Chips	▼	▲▲
Grocery	Salty Snacks – Meat Snack	▲▲	▲▲
Meat	Fresh Meat	▬	▲
Meat	Fully Cooked Meat	▬	▼
Produce	Fruit	▼	▲
Produce	Fruit – Avocados	▬	▲▲▲
Produce	Fruit – Bananas	▼	▲▲
Produce	Fruit – Kiwi	▼	▲▲▲
Produce	Fruit – Mangos	▼▼	▲▲
Produce	Vegetables – Kale	▼	▲▲
Produce	Vegetables – Mixed Vegetables	▼	▲▲
Alcohol	Beer/FMB/Cider/Seltzer	▬	▲▲
Alcohol	B/F/C/S – Non-Alcoholic Beer	▬	▲▲▲
Alcohol	Total Spirits	▬	▲▲
Alcohol	Total Wine	▼	▲
Alcohol	Total Wine – Non-Alcoholic Wine	▲▲	▲▲▲
Household	<i>Total department</i>	▬	▲
Pet Care	<i>Total department</i>	▬	▲▲

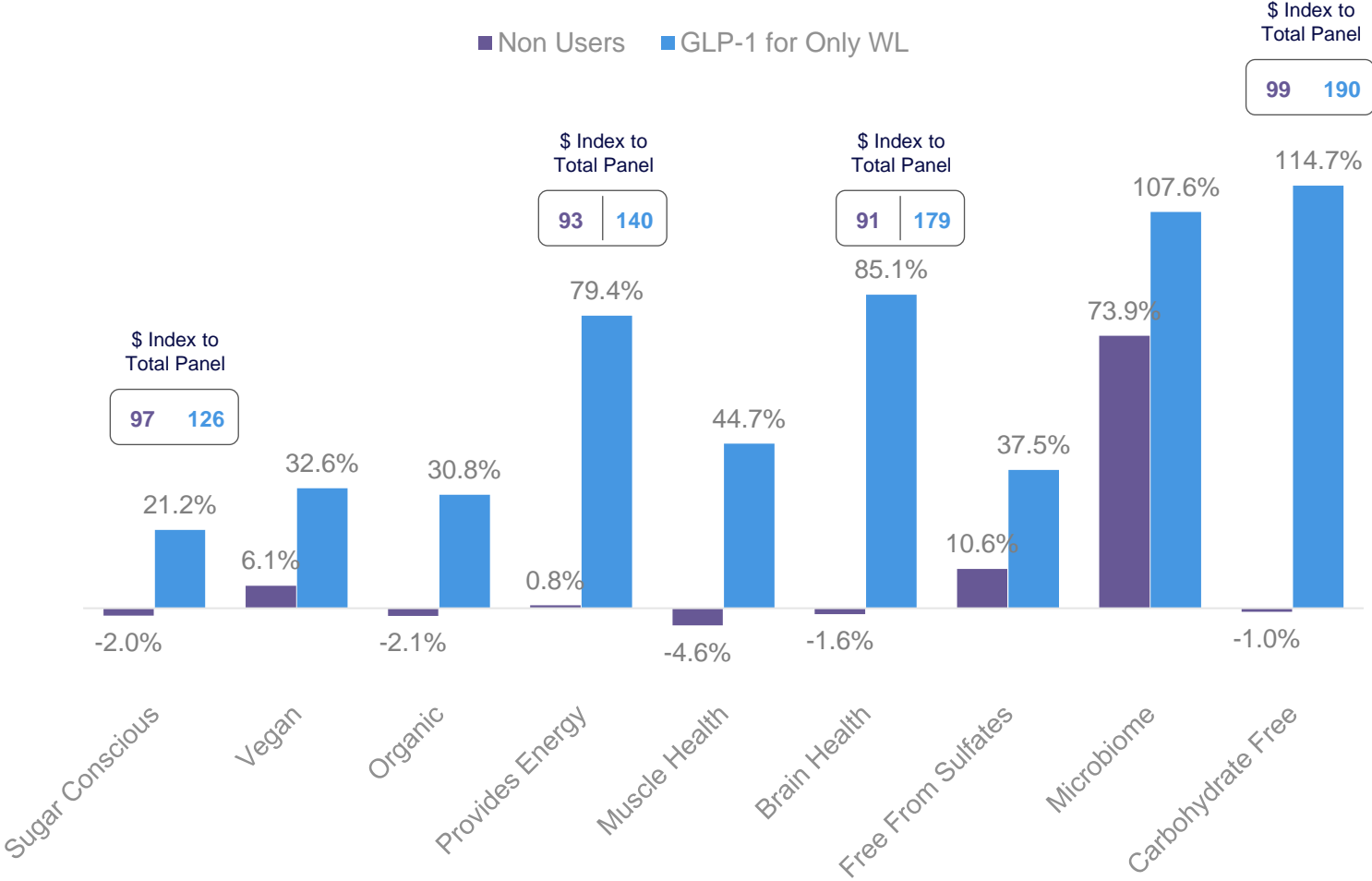
\*Survey respondents who stated that someone in their household began taking any of the GLP-1 injection prescriptions with the purpose of only treating weight loss

Source: NielsenIQ, Homescan GLP-1 Panel Survey; Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco), Dollar and Unit % Change vs YA, Latest 52 weeks ending September 28, 2024

# GLP-1 weight loss shoppers seem to be increasingly intentional

Health needs states, nutrition, clean label all showing strong growth

## Growth of GLP-1 Weight Loss versus Non Rx users



## Some attributes GLP-1 weight loss users showing stronger growth

- Immune health
- Joint health
- Muscle health
- Osteoporosis
- Bone Health
- Digestive Health
- Hair, Skin Nail support
- Clinically tested
- Free from aluminum
- Free from antibiotics, hormones
- Free from high fructose corn syrup
- Free from artificial colors, flavors, fragrances, ingredients
- Free from parabens and phthalates
- Free from sulfates
- Natural, natural flavors
- Calorie conscious, fat conscious
- Sodium conscious (especially very low sodium)
- Contains added sugar
- Nutrient dense
- Antioxidants stated
- Paleo
- Non-GMO
- Plant-based
- Free from gluten
- Excellent and good source of protein

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Food & Beverage; Product Insight stated claims on package; Unit % Change, 52 weeks ending September 28, 2024

# Channel behavior highlights shifting across GLP-1 users

## ***Grocery channel***<sup>1</sup>

- Gained the most share across all channels for GLP-1 for weight loss shoppers (counter to grocery trends for non-users)
- *Grocery* trip frequency is up for all GLP-WL (especially those who started 4-6 months ago)

## ***Mass channel***<sup>1</sup>

- Saw greatest share gains for the 7-11 month GLP-1 weight loss shoppers
- While shoppers who started a GLP-1 for weight loss 4-6 months and 1-3 months ago are showing declines in *Mass channel* share.<sup>1</sup>

## ***Drug channel***<sup>1</sup>

- GLP-1 WL shoppers tend to over index in the *Drug channel*, driven by weight loss shoppers who started 7-11 and 4-6 months ago
- GLP-1 for Weight Loss shoppers who started 1-3 months ago, ***under-index*** in the *Drug channel*.
- Most recent declines in 7-11 GLP-1 for weight loss shoppers in *Drug channel* may be of concern.<sup>1</sup>

## ***Warehouse/Club***

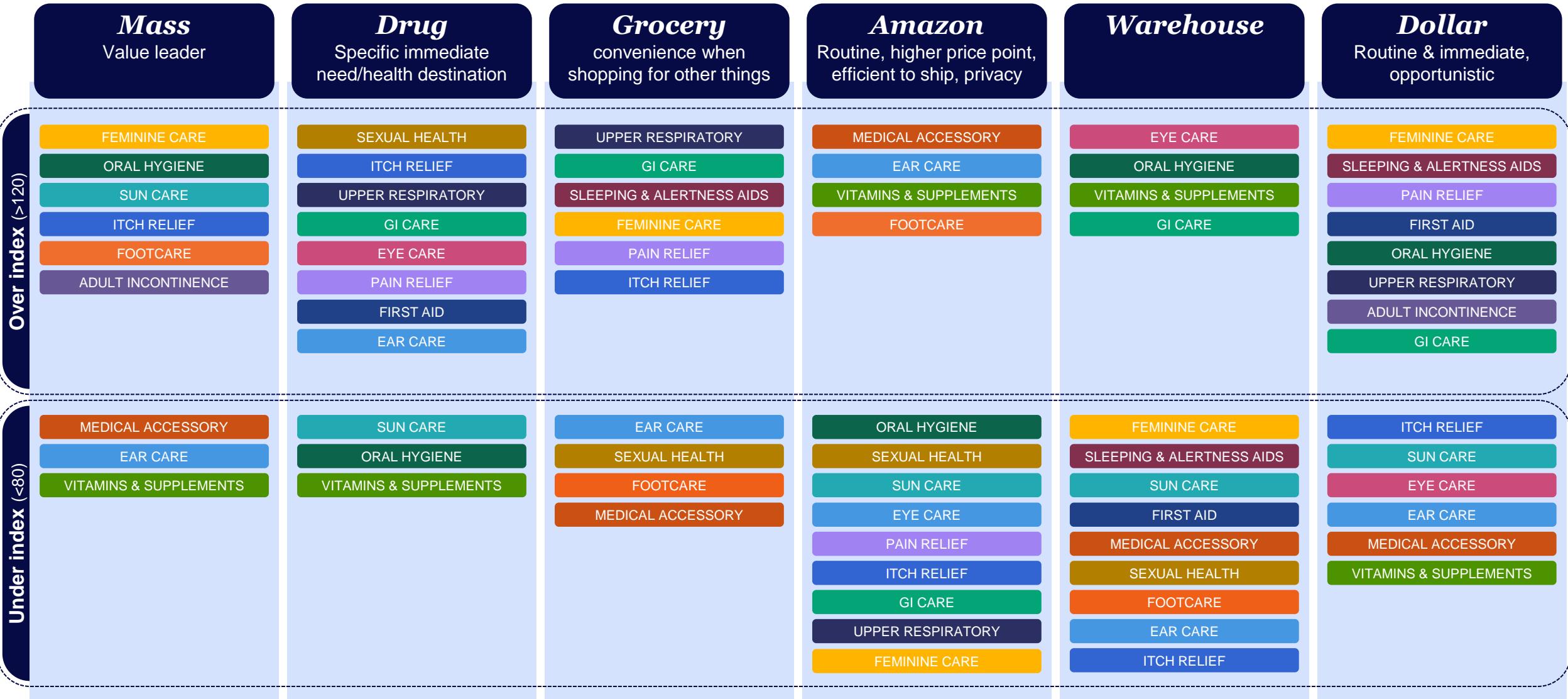
- Lost share across all GLP-1 (except 7-11 weight loss), trip frequency is up, for 1-3 months and 7-11 months

1 – Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store – All Departments; \$ Share of Wallet; 13 weeks ending September 28, 2024

2 – Source: NIQ Omnishopper Panel; Total US; Total Personal Care categories vs Total Store across channels; \$ Share Index; 52 weeks ending January 27, 2024

# Channel shifting will drive opportunities and potential vulnerabilities show to own the GLP-1 shopper journey?

Note: this index is across all consumers, not only GLP-1 shoppers



Source: NIQ Omnishopper Panel; Total US; Total Personal Care categories vs Total Store; \$ Share Index; 52 weeks ending January 27, 2024

# Pathways

1. As prevention: without or before GLP-1s
2. Onboarding/companion products
3. Off-boarding/step-down/after GLP-1

SEP 16, 2024

## Vital Pursuit Hits Shelves Nationwide as First-to-Market Nestlé Brand Designed for GLP-1 Users

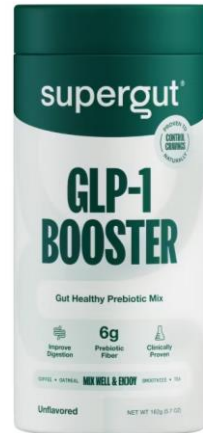
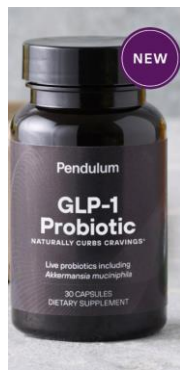
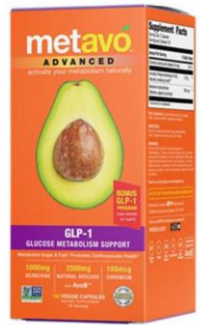
Introducing a line of delicious, high protein meals with essential nutrients; Vital Pursuit lands at national retailers to provide dietary support for GLP-1 users and consumers focused on weight management



### Why nutrition matters on your GLP-1 journey

GLP-1 drugs significantly reduce appetite and food intake. When eating less, choosing nutrient-dense foods becomes more important than ever. Here are top nutrition priorities from the experts.

- Protein**  
Getting enough protein is vital to minimizing muscle loss on GLP-1s.  
Learn More
- Fiber**  
Fiber intake is important because GLP-1s slow down digestion.  
Learn More
- Limiting Added Sugar**  
Added sugar provides calories, but often not much nutrition.  
Learn More



## Marketing News & Strategy

# SMOOTHIE KING CREATES GLP-1 MENU FOR WEIGHT LOSS DRUG USERS

Chain says it is the first quick-service restaurant to offer a dedicated menu for GLP-1 users

By Erika Wheless. Published on October 29, 2024.

Share article



**SUPPORT YOUR GLP-1 ROUTINE WITH PROTEIN, FIBER AND... 0g ADDED SUGAR**

# What's next...

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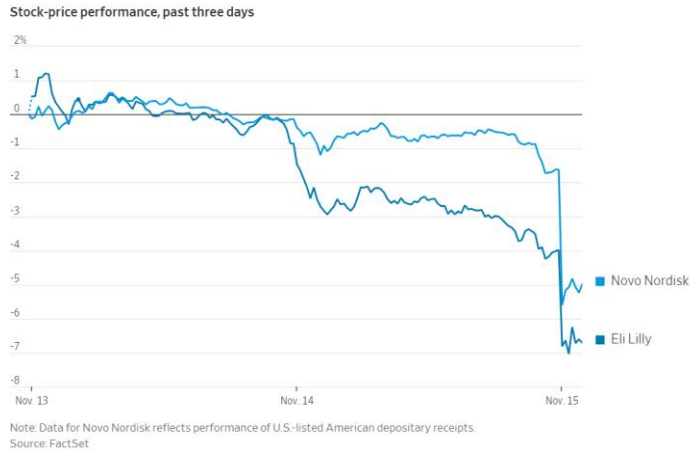
Last Updated: Nov 15, 2024, 6:48 PM EST

Updated 11 days ago

### Heard on the Street: RFK Jr. Is Spooking Obesity Investors Too



By [David Wainer](#), Columnist



## HEALTH AND WELLNESS

Robert F. Kennedy Jr.

Add Topic +

### Biden wants to cover weight loss meds. RFK Jr. would rather we just eat better.



[Alyssa Goldberg](#)  
USA TODAY

Published 10:12 a.m. ET Nov. 26, 2024 | Update

RFK Jr., though, seemingly wants to avoid all of that. In an interview with Fox News, he called out the high price tag of Novo's Ozempic. A bill called the Treat and Reduce Obesity Act would help expand reimbursement coverage for the cost of weight-loss drugs.

"That alone will cost \$3 trillion a year," he said, [according to Newsweek](#). "If we spend about one-fifth of that giving good food, three meals a day to every man, woman, and child in our country we can solve the obesity and diabetes epidemic overnight for a tiny fraction of the cost."

Public Health & Policy > Medicare

### Biden Proposes Coverage of Obesity Drugs in Medicare, Medicaid

— Federal government would pick up about three-fourths of the cost for Medicaid coverage

by [Joyce Frieden](#), Washington Editor, MedPage Today  
November 26, 2024

# Closing thoughts

*GLP-1 is creating a catalyzing moment in health;  
shift in the conversation around obesity*

*Trends shifting and will continue to shift with marketplace  
dynamic of GLP-1 drug innovations, compounding  
pharmacies, legislation, funding,  
new consumers trying drugs and lapsing*

*The opportunity to support consumers throughout their  
health journey opens doors for product and retail  
innovation*

**Upcoming GLP-1 Webinar  
February 5, 2025**

*retailmediaIQ*

*NielsenIQ*

*Kearney*

*ThinkBlue*