



EAT SMART ASIA

THE GLP-1 SHIFT

KNOWLEDGE SYMPOSIUM 2026

Inside The India GLP-1 Consumer Journey:
How a smaller appetite could reshape the future
of food and beverage



A NEW CONSUMER PARADIGM

INDIA HAS THE NEED, THE TRIGGER IS HERE.

The food and beverage impact may emerge quickly as medical access, metabolic need and household eating habits converge.

The underlying need is already at scale, and access is accelerating. As appetite changes, food behavior follows, creating a near-term need to rethink product design, claims and occasions.

101M

Indians living
with diabetes

136M

Indians with
pre-diabetes

1 in 4

are overweight

6x

AOM market
growth since 2021

5x

GLP-1 market
growth by 2030

F&B

ecosystem must
evolve with
appetite change

HOW WE LEARNED WHAT WE KNOW

THE CONSUMER RESEARCH PROCESS

Interviews uncovered lived experiences, quantitative consumer research validated the tensions, and sensory exploration revealed directional preferences.



1. Qualitative

Qual: in-home depth interviews: Delhi, Mumbai, Bengaluru



2. Sensory Exploration

Intensity test on five basic taste solution



3. Quantitative

Quant: GLP- 1 consumers across India



4. Product Tasting

Exploring sensory cues, preferred/ not preferred by consumers

THE BODY MOVES ON FROM FOOD FASTER THAN LIFE CAN ADJUST

Appetite shrinks quickly, but identity, habits, family expectations and social life remain present.

65%

Say appetite is
significantly reduced

64%

Experience social eating
discomfort sometimes



The real consumer journey begins in the gap between biological appetite reduction and the need to keep participating in everyday food culture.

Implication: products must do more than reduce calories. They must help consumers feel safe, included and satisfied within smaller eating moments.

THE PEN PORTRAIT



VIKRAM

Health Driven Optimizer

Preventing a future they don't want

Core Anxiety: Long-term health consequence



PRIYA

Appearance & Confidence Seeker

Rebuilding a relationship with themselves

Core Anxiety: Being judged, fear of relapse



ANANYA

Pragmatic Experimenter

Searching for evidence after a lifetime of disappointment.

Core Anxiety: Wasting time and money



RIYA

Socially Influenced Adopter

Seeking belonging as much as weight loss.

Core Anxiety: Long-term health consequence



SURESH

Holistic Lifestyle Transformer

Using GLP-1 as a catalyst for a broader life reset.

Not a fifth door. It is the room the four doors open into: a life where progress is sustainable and food can belong again.

THE NEW APPETITE MODEL

A four-stage journey from bodily disruption to social reintegration. The first disruption is biological. The lasting challenge is behavioral and social.

SURVIVE

WEEKS 1-4

“Help me get through this”

SAFETY



ADAPT

MONTHS 1-3

“I need to relearn how to eat”

CONFIDENCE



OPTIMISE

MONTHS 3-12

“Now I need a rhythm that works”

CONTROL



THRIVE

LONG TERM

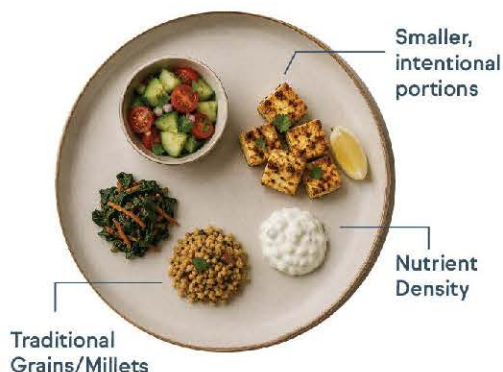
“I want to live normally”

BELONGING



THE PLATE GETS SMALLER, THE GLASS AND PALATE ARE BEING REDEFINED.

THE PLATE



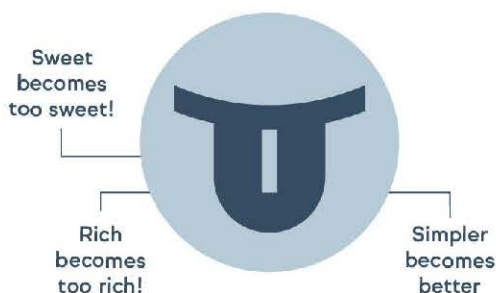
THE GLASS

Hydration has become the new daily ritual



THE PALATE

Beyond Appetite: GLP-1 Changes Sensory Experience



Before

After

2.5 Bowls

RICE

½ Bowl

5–6 Pieces

IDLI

2 Pieces

Full Pack

NAMKEEN

5–10 Pieces

3–4

CHAPATI

1–2

Eating less does not mean wanting to experience less.

90%

Experience changes in how food tastes or feels

50%

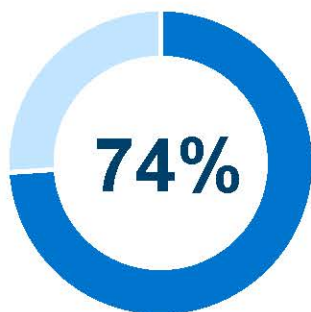
Prefer, soft, easy to digest textures

69%

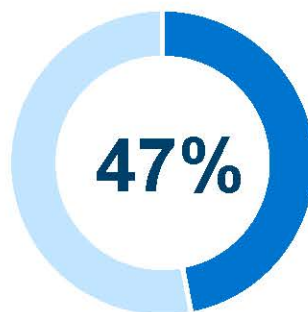
Want balanced flavor impact

INDIVIDUAL APPETITE CHANGES FASTER THAN THE HOUSEHOLD BASKET

The GLP-1 consumer is becoming a more deliberate food shopper. Food must justify its place in the shopper basket. Label scrutiny is rising but trust still needs to be earned.



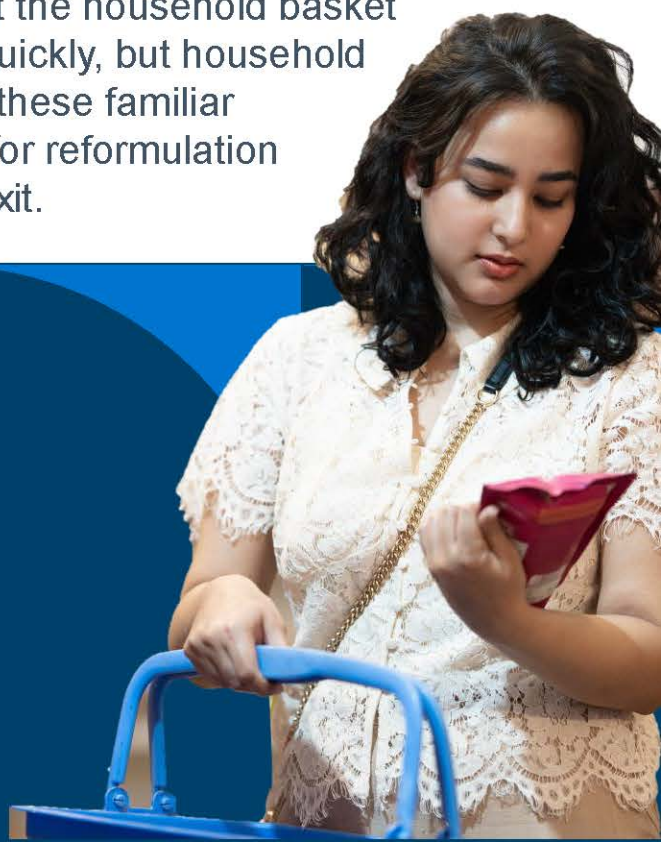
Read labels more carefully
than before GLP-1



trust front-of-pack
claims

The personal consumption changes but the household basket remains. Individual appetite may shift quickly, but household rituals and shared food moments keep these familiar categories in the home, creating room for reformulation and role change rather than category exit.

The Household Still Buys



THE IMPLICATIONS

REDESIGN THE EXPERIENCE, NOT ONLY THE NUTRITION PANEL

The opportunity extends across product, sensory, packaging and occasion design.

PRODUCT DESIGN

Smaller formats with higher nutrition and satisfaction per serving.

NUTRITION

Protein, fiber, nutrient density and hydration that fit reduced appetite.

SENSORY

Flavor clarity, acceptable texture and less overload.

PACKAGING

Clearer proof, ingredient transparency and easier value assessment.

OCCASIONS

Portable meal bridges and lighter ways to join social moments.

INDULGENCE

More reward per bite, with pleasure and permission preserved.

Every Bite and Sip Has to Work Harder

Future food must nourish, satisfy and preserve the eating experience simultaneously.



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