



Redesigning the Future of Food and Nutrition

GLP-1 Era

The satiety paradox

The same food industry that optimized hyperpalatability is now engineering to restrain and balance with smaller portions, fewer bites, and nutrient density.



GLP-1* accelerated the shift

Rethinking value in food

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Rethinking value in food

GLP-1 accelerated and connected trends that were already emerging separately:

- Early signals came from retailers.
- Protein trend is shifting from quantity to quality.
- Lines between clinical nutrition, active nutrition, and everyday wellness are blurring.





How should CPG brands and ingredient companies navigate the satiety paradox?

Agenda

01

Landscape: Key consumer unmet needs

02

Analysis: Mapping technology categories to key unmet needs

03

Outlook: Actionable strategies for food industry players

Lux's ethnographic research

Identifying unmet needs of three GLP-1–associated consumer groups

Pre-/ non GLP-1 RA* users

- Weight management
- Metabolic health management

Active GLP-1 RA users

- Appetite regulation
- Minimize gut discomfort
- Maintain muscle mass
- Hydration
- Sensory

Post GLP-1 RA users/ maintenance phase

- Appetite regulation
- Weight management
- Satiety

10 technology clusters

High protein and fiber form the core stack for GLP-1 support nutrition; bionics, botanicals, and novel metabolites are emerging



High proteins



Prebiotics & fibers



Botanical compounds



Bionics



Novel ingredients

Enabling technologies could potentially unlock solutions tailored to pre-, active-, and post-GLP-1, shaping where innovation can scale



Ingredient informatics



Wearable devices



Personalized nutrition



Flavor modulators



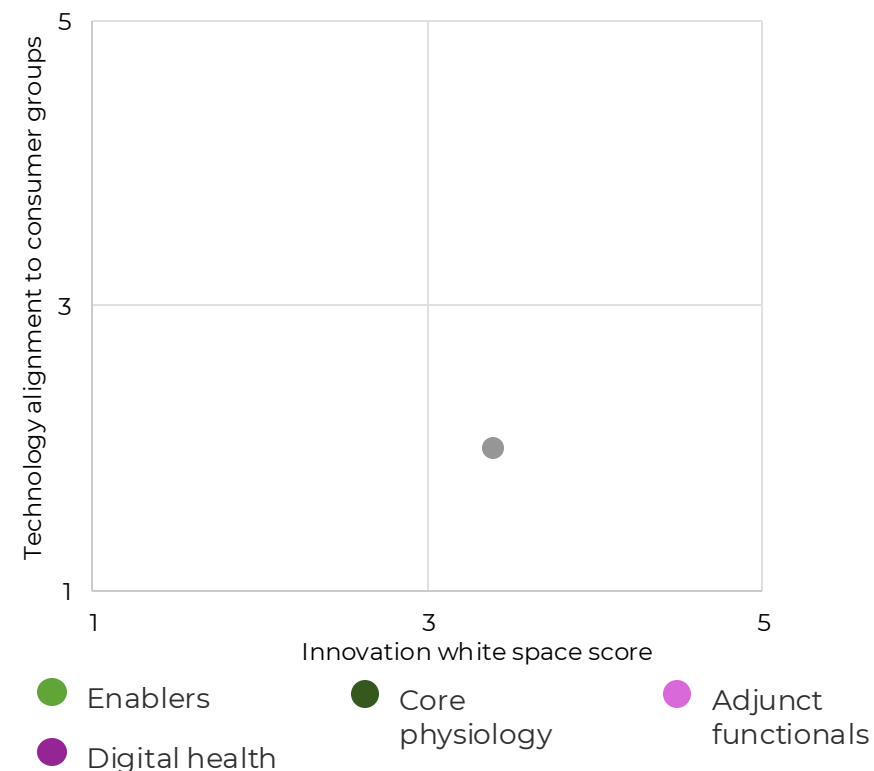
Electrolytes

Identifying sweet spots

Lux evaluated the 10 tech clusters across two strategic dimensions

Y-axis: Technology alignment to consumer groups

X-axis: Innovation white space

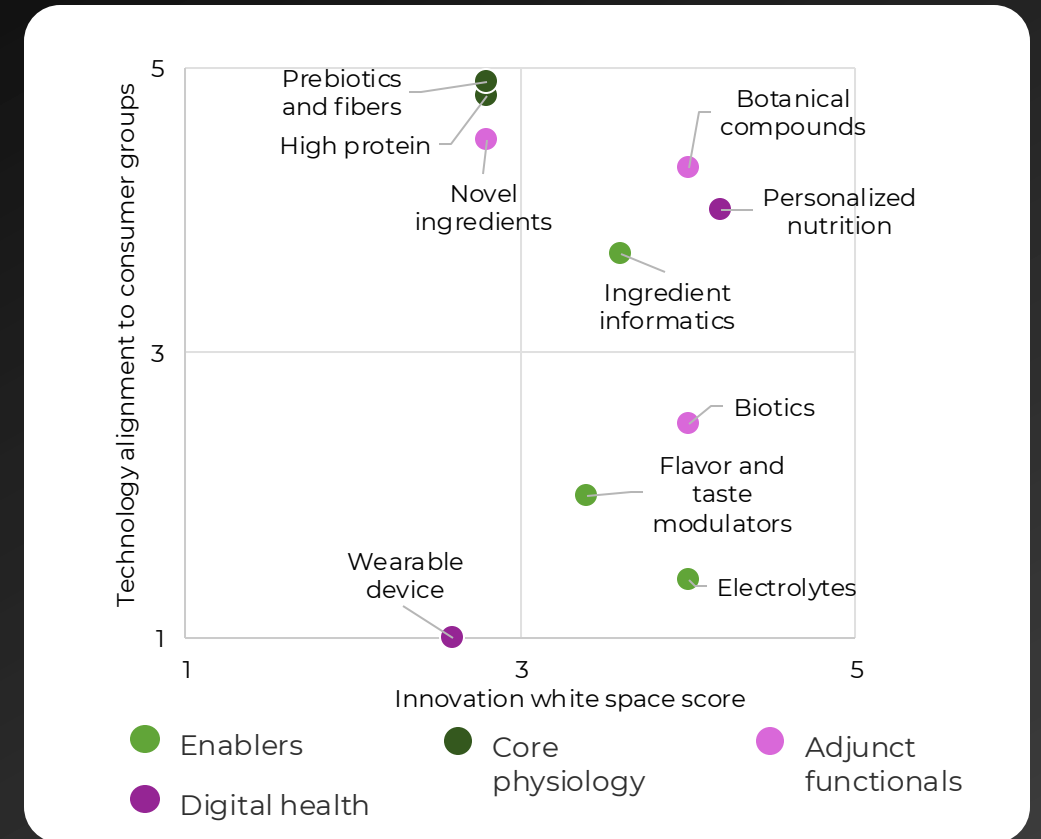


Identifying sweet spots

Lux grouped the 10 technology clusters into four categories based on their support across the three consumer phases

According to GLP-1-related positioning in the market:

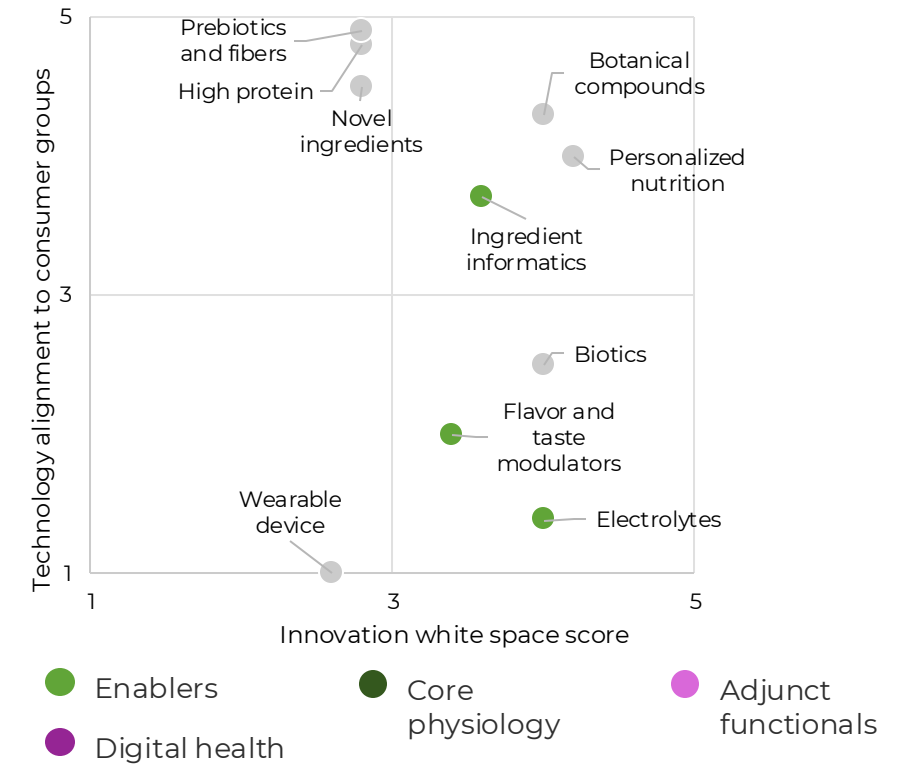
- Tech clusters are either enablers, core physiology, adjunct functionals, or digital health.
- This analysis is based on 45 innovators across CPG, D2C, ingredients, supplements brands, and digital health platforms from early 2024, when GLP-1 usage spiked.



Enablers will gain value when stacked with stronger adjuncts

Enablers improve the experience around nutrient-dense eating

- Sensory satisfaction will be nonnegotiable for repeat consumption.
- Ingredient informatics can speed satiety-aligned ingredients and formulations.
- Electrolytes have rarely been marketed for GLP-1 users due to unclear ROI and regulatory ambiguity.



NotCo's GLP-1 booster

The unveiled botanical powder blend acts as a natural Ozempic alternative

NotCo's white-label ingredient is not yet commercially mature.

- It claims to naturally stimulate GLP-1 and can be added to any food or used as a B2B ingredient.
- It relies on the existing regulatory status of each component rather than a new-ingredient approval.

LUX TAKE

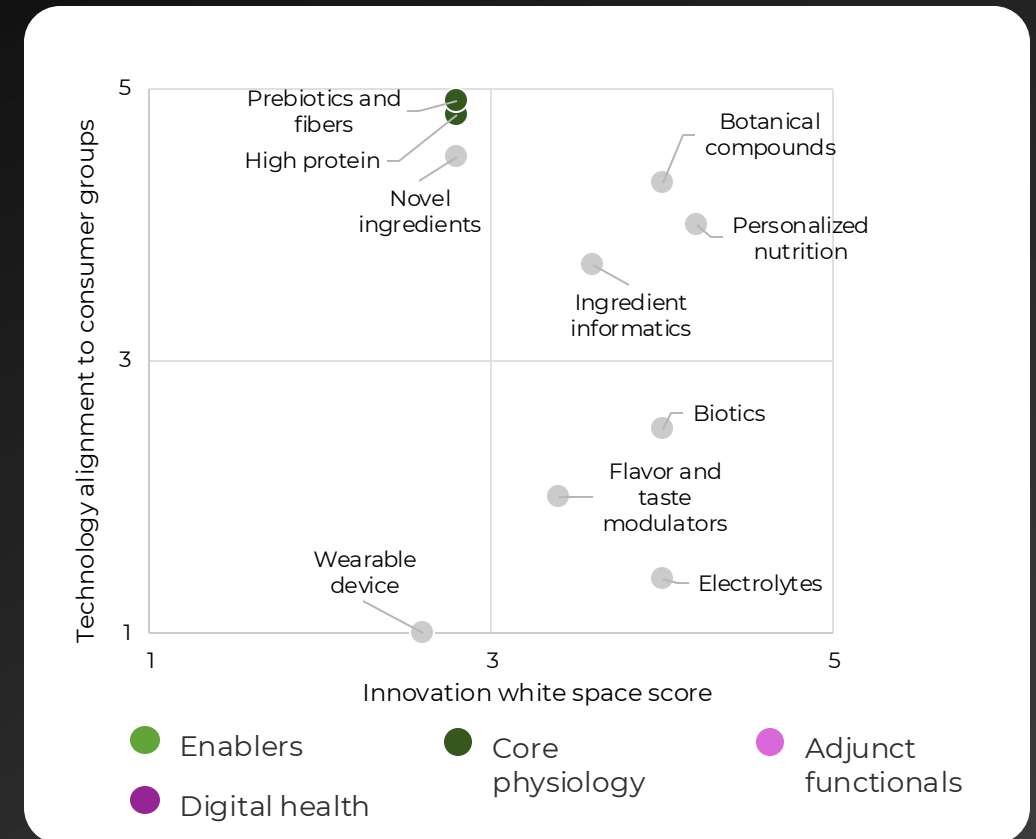
Ingredient and CPG clients should treat boosters as an experimental category until more substantial evidence and clearer guidance emerge.



Core physiological relevance offers the most durable bets for GLP-1 support

These directly influence satiety, digestion, GI comfort, or muscle support

- Prebiotics, fibers, high protein, and certain botanical compounds are the low-hanging fruits.
- Full-stack ingredient providers are bundling existing ingredients into GLP-1-focused concepts.
- For the dairy and meat industries, GLP-1-spurred protein demand is a big opportunity.



Valio's dairy strategy

Valio repositioned its existing high-protein products for metabolic and sports nutrition

Valio expanded the use of Eila lactose-free low-GI milk powder range.

- It repositioned Eila MPC* 65 for challenges associated with nutrient-dense reformulation.
- It also expanded the distribution of its B2C brand, PROfeel high-protein products.

LUX TAKE

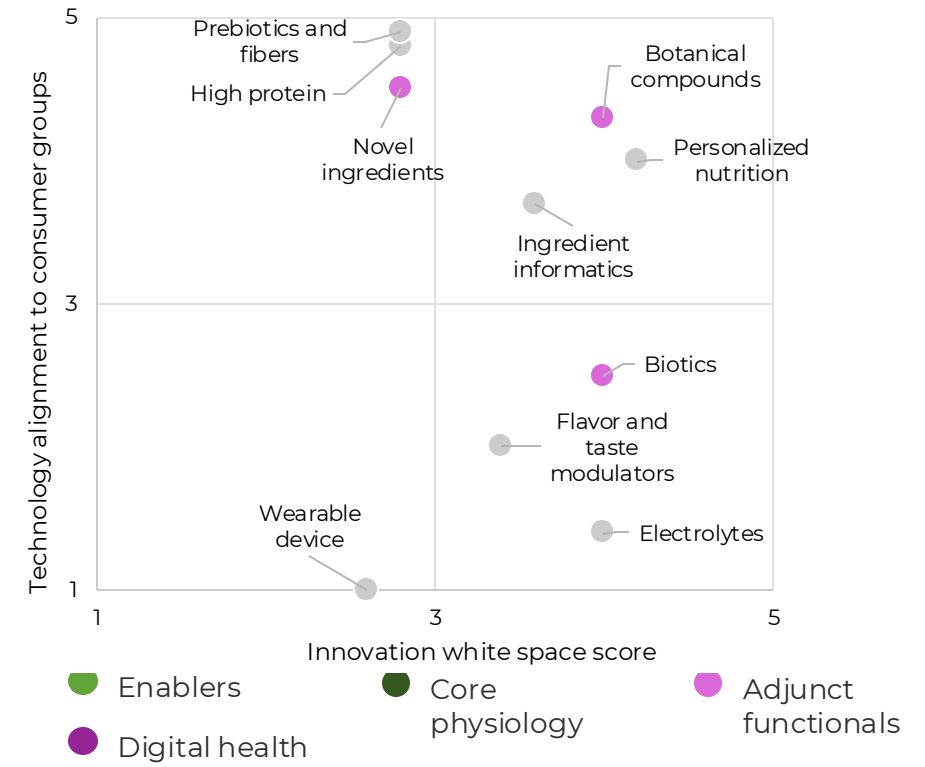
Dairy clients should work on a similar shift from protein fortification to metabolic-performance nutrition without overindexing on explicit GLP-1 branding.



Adjunct functionals are an early stage opportunity

Ingredients offer complementary benefits, such as appetite modulation

- Developers have not yet positioned biotics explicitly for GLP-1 support; consumer understanding is vague.
- Botanicals are largely concentrated in supplements.
- Regulatory and medical communities are already cautious about novel metabolites that imply GLP-1 mimicry.



Lembas' peptide

The bioactive peptide claims to activate the body's GLP-1 and other gut hormones

- Its patent-pending technology, licensed from Tel Aviv University, uses AI to discover, design, and screen bioactive peptides.
- Positioning the peptide as an Ozempic competitor, Lembas plans to sell it as a supplement initially, before F&B.

LUX TAKE

Lembas reflects growing investor appetite for AI-designed metabolic bioactives; clients should monitor for now, as its path to mainstream food integration remains unclear.

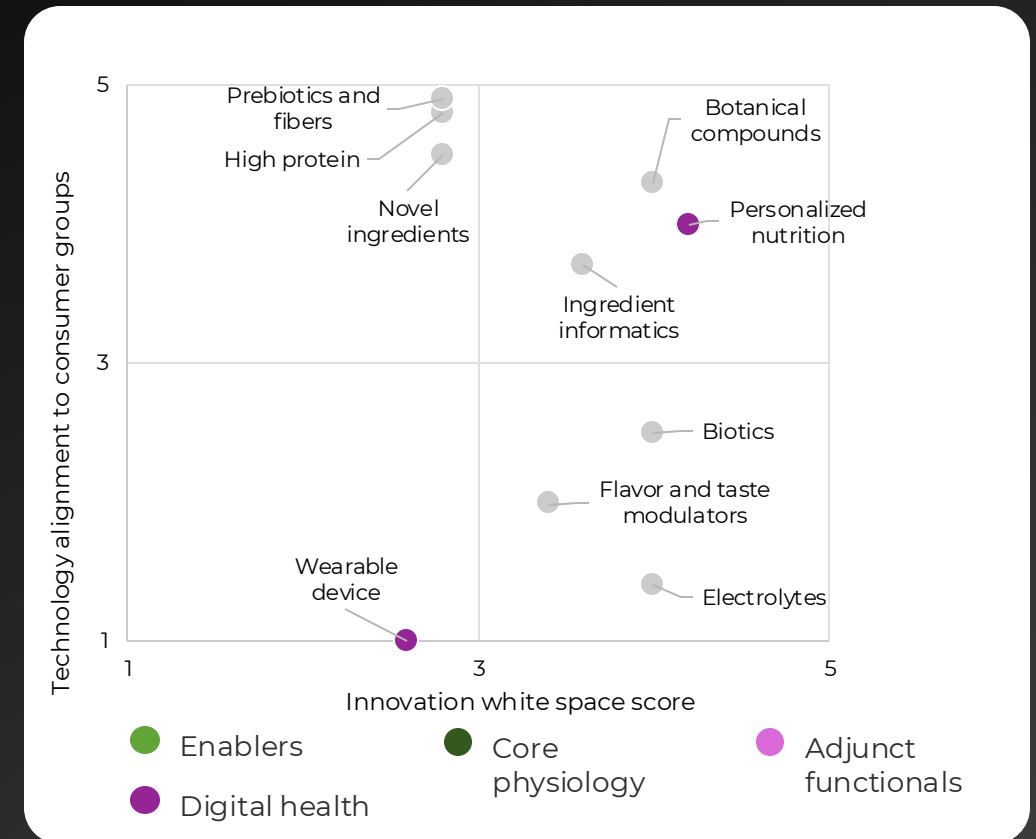


lembas

Wearables are improving for metabolic health markers but are not yet credible enough

These are tools like CGM*-linked apps and nutrition counseling platforms

- Investment is surging in digital nutrition, meal-delivery, and white-label services.
- Long-term consumer engagement remains uncertain amid regulatory changes.
- Amid the shift toward “stratified” nutrition, clients must understand the needs of the three user cohorts.



Ōura acquires Veri

Ōura is aggressively expanding and personalizing its metabolic health offerings

- Ōura prepares to launch Meals, a feature designed to track the timing of meals and their effects on key health metrics.
- It also acquired Sparta Science and partnered with Dexcom, leading to a USD 11 billion valuation by the end of 2025.



LUX TAKE

Food clients looking to expand their portfolios in this space could face similar short engagement cycles, limited meal personalization, and unclear ROI in the near term.

ŌURA



A phased innovation strategy will outperform one-size-fits-all GLP-1 positioning

Short Term (Product Enhancement)

Reposition existing products around nutrient density, satiety, and metabolic health.

Medium Term (Innovation Platform)

Reformulate familiar categories with stacked functionality, sensory optimization, and targeted nutrition.

Long Term (Strategic)

Build metabolically relevant ecosystems that support consumers across pre-, active-, and post-GLP-1 journeys.

Key takeaways

1

Satiety paradox is the North Star

Across consumer segments, the direction is clear: smaller portions, higher payoff per serving, nutrient density, and a renewed focus on high-quality protein.

2

GLP-1 journey is much more than just nutritional changes

Brands that make consumers feel seen will stick. Food and ingredient companies should align portfolio bets with fast-growing, metabolically relevant categories.

3

Outcomes matter more than “GLP-1” branding

As regulations, standards, and science are still catching up, transparency and clean ingredient positioning will strengthen consumer trust and acceptance.



Thank You



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