

GLP-1s and the Future of Concessions

How changing appetite, snacking and beverage behavior should reshape the concession mix

PRESENTED BY



GLP-1 IN 60 SECONDS

What is GLP-1?



NATURAL SIGNAL

A hormone the body already makes — released after eating, helps coordinate the response to food.



HOW IT WORKS

A stronger fullness signal — supports blood-sugar control, slows digestion and reduces appetite.



WHY IT MATTERS

A medication class with two major uses — type 2 diabetes and obesity/weight management.

The key point is behavioral: many users feel full sooner and eat less overall.



Who is the GLP-1 User?

1

Life Stage

Skews older — Older Gen X and Baby Boomers with established consumption routines now reshaping them.

2

Economics

More affluent households with greater access, resources, and more control to reshape daily routines.

3

Household

Smaller households with fewer people in the home and more individualized purchase decisions.

Use this as a planning lens, not a stereotype. GLP-1 adoption is broadening as awareness and access grow.



The Consumer Base Is Already Meaningful

As of July 2026, GLP-1 usage has reached a scale that directly impacts assortment planning today.

23%

Household Penetration

of U.S. households currently use a
GLP-1

12.2%

Weight Loss Use

of households use a GLP-1 specifically
for weight loss

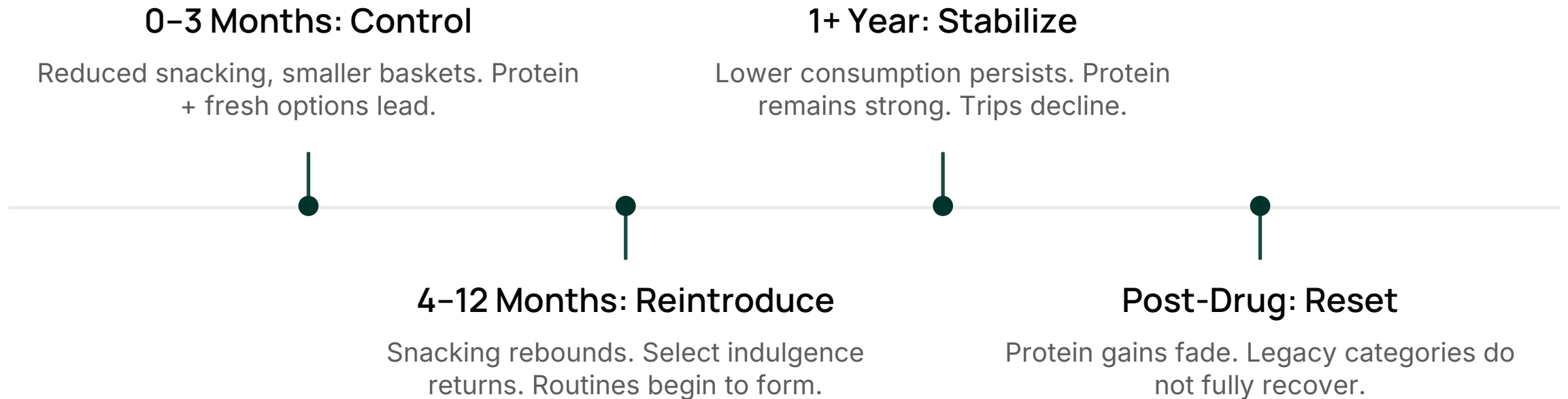
22.7%

Consideration

of households would consider using a
GLP-1

**Assortment decisions now need to work for both
GLP-1 users and the broader occasion.**

Behavior Changes by Stage, Not All at Once



Build an assortment portfolio for multiple stages, rather than a single "GLP-1 shopper."

Consumption Becomes More Intentional

1

1 – Control

Less food noise. Consumers filter more carefully and purchase with greater deliberation.

2

2 – Purpose

A snack solves a need. Every item is selected because it serves a function, not just out of habit.

3

3 – Portion

Smaller moments. Right-sized choices become the preference over oversized default formats.

4

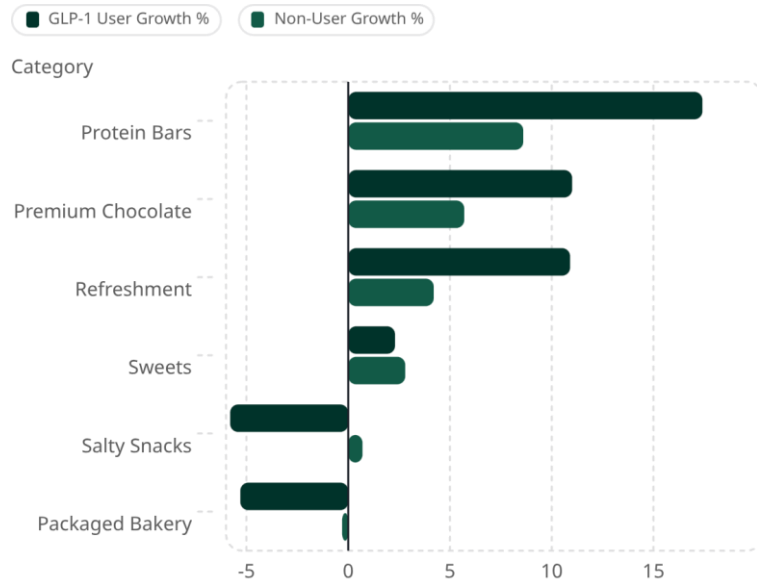
4 – Payoff

Indulgence must earn it. Premium quality and distinctiveness justify the treat.

"The opportunity is not to label foods 'good' or 'bad.' It is to make purpose, portion and payoff clearer."

The Concession Basket Is Being Reallocated

GLP-1 users are accelerating functional and premium choices



📌 Total CMG: GLP-1 users +5.9% vs non-users +4.0%

Growth Signals

Protein bars (+17.4%), premium chocolate (+11.0%), and refreshment (+10.9%) all significantly outpace non-users.

Pressure Signals

Salty snacks (-5.8%) and packaged bakery (-5.3%) face meaningful declines among GLP-1 users.

Planning Principle

Use the signals to rebalance space and choice — not to eliminate traditional categories.



Snacking Shifts from Impulse to Mission

Every snack now needs a clear job. GLP-1 users select purposefully — your assortment should reflect that intentionality.



Functional Fuel

Protein bars, meat snacks, nutrition-forward options that solve a tangible need



Worth-It Indulgence

Premium, trusted and distinctive treats where quality justifies the choice



Refreshment

Gum, mints and lighter sensory moments that satisfy without excess

Concessions Can Win Because the Occasion Is Different



Scarcity

A limited-time permission purchase — the context itself grants a pass to indulge.



Memory

Part of the entertainment experience — the food becomes part of the story, not just fuel.



Social + Premium

Often shared with a group. Value can come from quality, not size — premium earns its place.

One Zone, Two Consumer Missions

The strongest assortment lets consumers choose their level of participation without leaving the zone.

PERMISSION TO PARTICIPATE

- Protein-forward options
- Hydration and functional beverages
- Right-sized portions
- Refreshment choices

PERMISSION TO INDULGE

- Premium treats
- Trusted favorites
- Elevated hot food
- Signature beverages
- Shareable experiences

THE TAKEAWAY

Rebalance, Test and Learn



REBALANCE

Add purposeful choices while preserving favorites. Both missions belong in the assortment.



MAKE ROLES CLEAR

Help consumers navigate fuel, refreshment, satisfaction and indulgence without confusion.



SELL THE OCCASION

Make premium treats feel intentional and worth it — lean into scarcity, memory and social context.



MEASURE

Track mix, attachment and check by venue and daypart to learn what works and iterate.

Build a concession assortment that lets more consumers participate, then gives them a reason to trade up.

