



Produce Purchasing Habits of GLP-1 Users



February 2026



Objective: Given the consumer reach of GLP-1 drugs, IFPA would like to better understand the impact on consumer purchase behavior within the Produce department, for fresh fruits and veggies as well as for the top (highest selling) fruit and veggie categories at US retail.



Methodology:

Analysis of Circana Survey Data from November 2025 ending January 26, 2026

Key Questions Addressed

- What % of Households are on GLP-1s?
- What % of dollars do GLP-1 User Households contribute to US Food & Beverage at Retail?
- How does purchase behavior of Food/Bev, Produce & top selling Fruits and Veg compare for users and non-users?
- What are the demographics of GLP-1 User households?



Key Takeaway:

GLP-1 Users are not automatically increasing their produce purchasing compared to other food and beverage categories or non-users

Fresh Fruit purchases are growing at a faster rate among GLP-1 users vs. non-users, with higher sales contributions from Apples, Oranges, Lemons, and Bananas. Additionally, GLP-1 users spend more dollars on Grapes and Melons than expected compared to those categories' share of produce.

Fresh Vegetables purchases are declining among GLP-1 users, despite this salad kits are capturing the largest share growth. Onions, Tomatoes, and Potatoes also see GLP-1 users outpacing share versus non-users.



Key Takeaway:

GLP-1 users represent a large, growing consumer segment—but produce will not benefit by default.

Growth opportunities exist in:

- Fresh fruit (especially apples, bananas, grapes, melons)
- Convenient, functional vegetables (salad kits, potatoes, tomatoes, onions)
- Longterm GLP1 users and high concentration regions (Northeast, Southeast)

To win with this segment, produce must be explicitly positioned around satiety, nutrition density, convenience, and alignment with GLP-1 dietary guidance—not simply health in general.



Findings:



1

15% of
Households
using GLP-1

+2.9M Users

2

Weight
management
top reason for
using GLP-1
medications

Typical duration 6-12
months

3

Uptick in
purchasing
convenient
prepared foods
+ food service

4

More protein, fiber,
gum, healthy fats and
hydration

Less carbs, saturated
fats, high levels of
sugar, processed
meats, beverage
alcohol, spicy foods,
etc.



GLP-1 Households

15% of share of edible purchases

15% of share produce purchases

Up 0.7%

GLP-1 Households are purchasing food at home at a greater rate.

NON GLP-1 Households

85% of share of edible purchases

85% of share of produce purchases

Down 0.7%



GLP-1 Households

16% of share of edible dollars
Up 0.8%

14% of share produce dollars
Up 0.2%

***GLP-1 Households are
spending on other food
categories at a greater rate
than produce.***

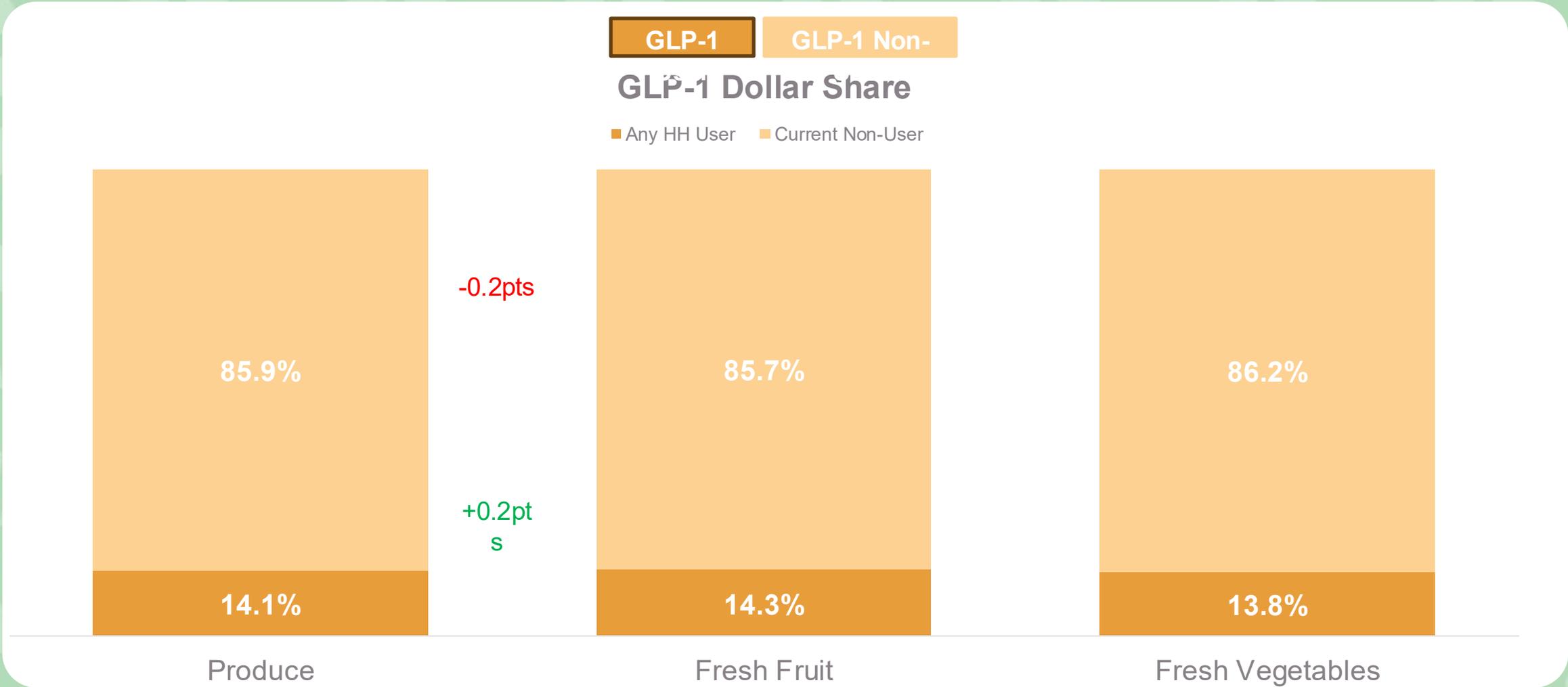
NON GLP-1 Households

84% share of edible dollars
Down 0.8%

86% share of produce dollars
Down 0.2%



GLP-1 User vs Non-User Dollar Share within Produce

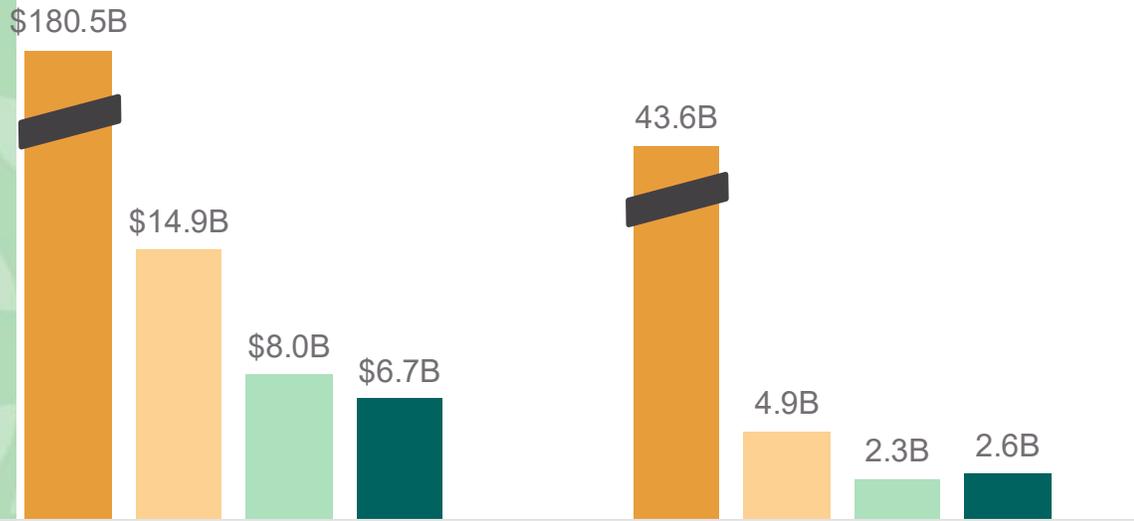




GLP-1 user sales growth is driven by Fresh Fruit, with declines in Fresh Vegetables, although less unit erosion than Non-Users

GLP-1 User Sales

■ Total Edible ■ Produce Dept ■ Fresh Fruit ■ Fresh Vegetables



Dollar Sales

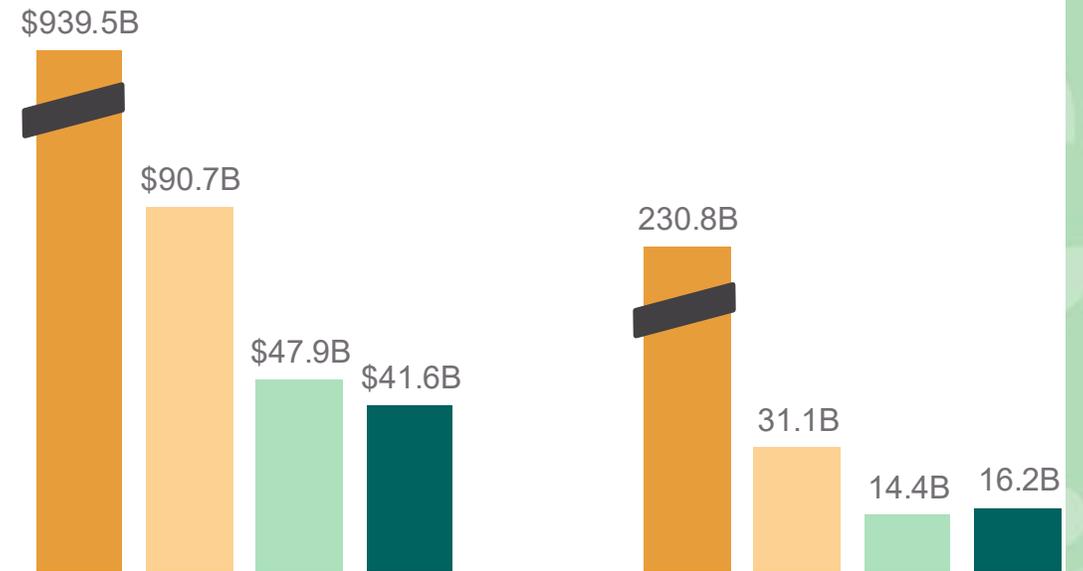
Unit Sales

8.5%	3.2%	6.7%	-0.9%
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6.1%	2.2%	5.9%	-1.1%
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GLP-1 Non-User Sales

■ Total Edible ■ Produce Dept ■ Fresh Fruit ■ Fresh Vegetables



Dollar Sales

Unit Sales

2.4%	1.3%	4.0%	-1.7%
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0.0	-0.1%	2.2%	-2.4%
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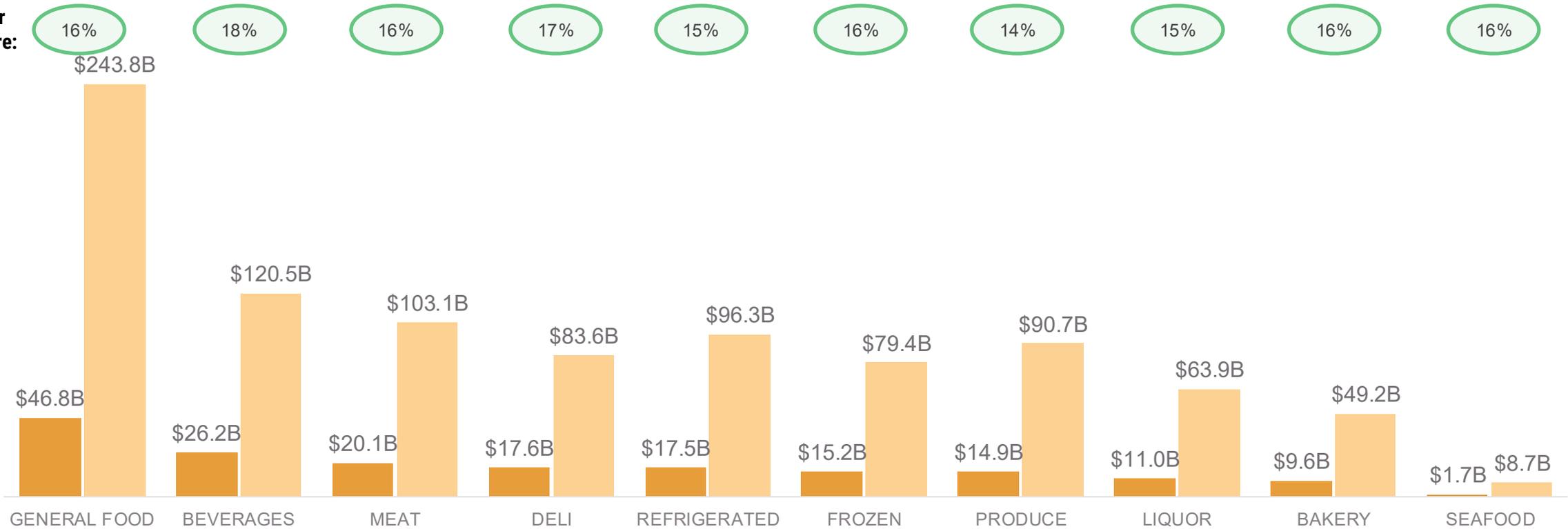
GLP-1 Users are spending more on beverages and protein

Dollar Sales Among Edible Departments

GLP-1

GLP-1 Non-

GLP-1 User Dollar Share:



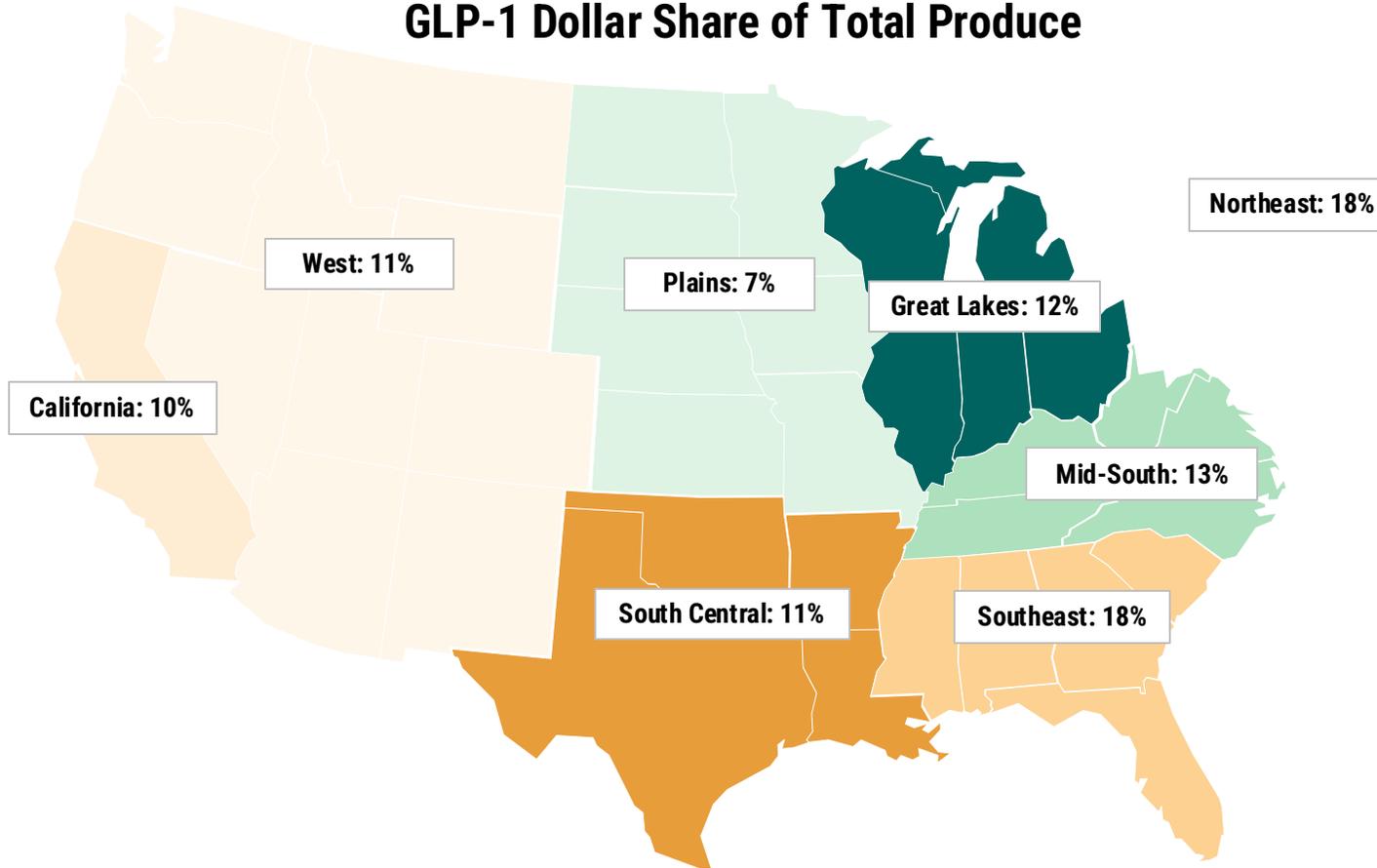
% Chg YAG:

7.8%	1.5%	15.4%	6.8%	13.1%	6.1%	9.9%	1.6%	6.7%	3.3%	5.3%	0.9%	3.2%	1.3%	3.5%	-3.3%	7.9%	0.4%	9.2%	-1.6%
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GLP-1 Users have the highest dollar share concentration in the Northeast and Southeast for produce

GLP-1 Dollar Share of Total Produce



GLP-1 \$ Share of Total Edible	
California	9%
Great Lakes	14%
Mid-South	13%
Northeast	18%
Plains	7%
South Central	13%
Southeast	16%
West	9%



Long term GLP-1 users findings



LONG Term GLP-1 Households

58% of share of produce purchases

Down 0.3%

58% of share produce dollars

Up 0.1%

Long term GLP-1 Households are purchase more produce and have greater dollar spend.

LESS than 1 year GLP-1 Households

42% of share of produce purchases

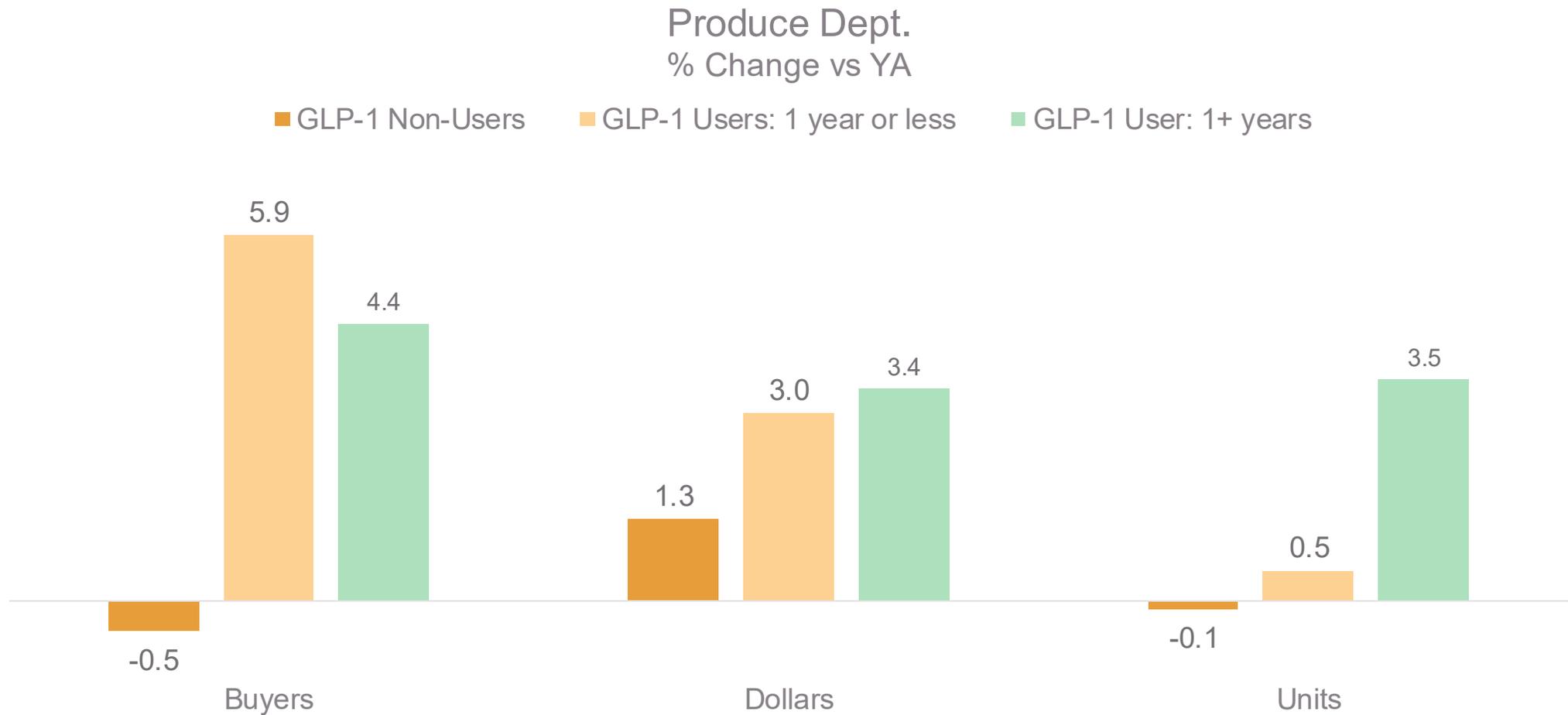
Up 0.3%

42% of share of produce dollars

Down 0.1%



Within Produce, GLP-1 Users for 1+ years are spending more dollars and buying more units





Category findings



GLP-1 Indices Among Dollar and Unit Share

Top Produce Subcategories	Dollar Index		Unit Index	
	GLP-1 Users	Non-Users	GLP-1 Users	Non-Users
Berries	95	101	98	100
Grapes	110	98	109	98
Melons	120	97	121	97
Apples	98	100	99	100
Tomatoes	100	100	101	100
Potatoes	107	99	108	99
Bananas	92	101	94	101
Onions	104	99	103	99
Lettuce	97	100	104	99
Salads-Kits	106	99	109	99



GLP-1 Dollar and Unit Sales Trends

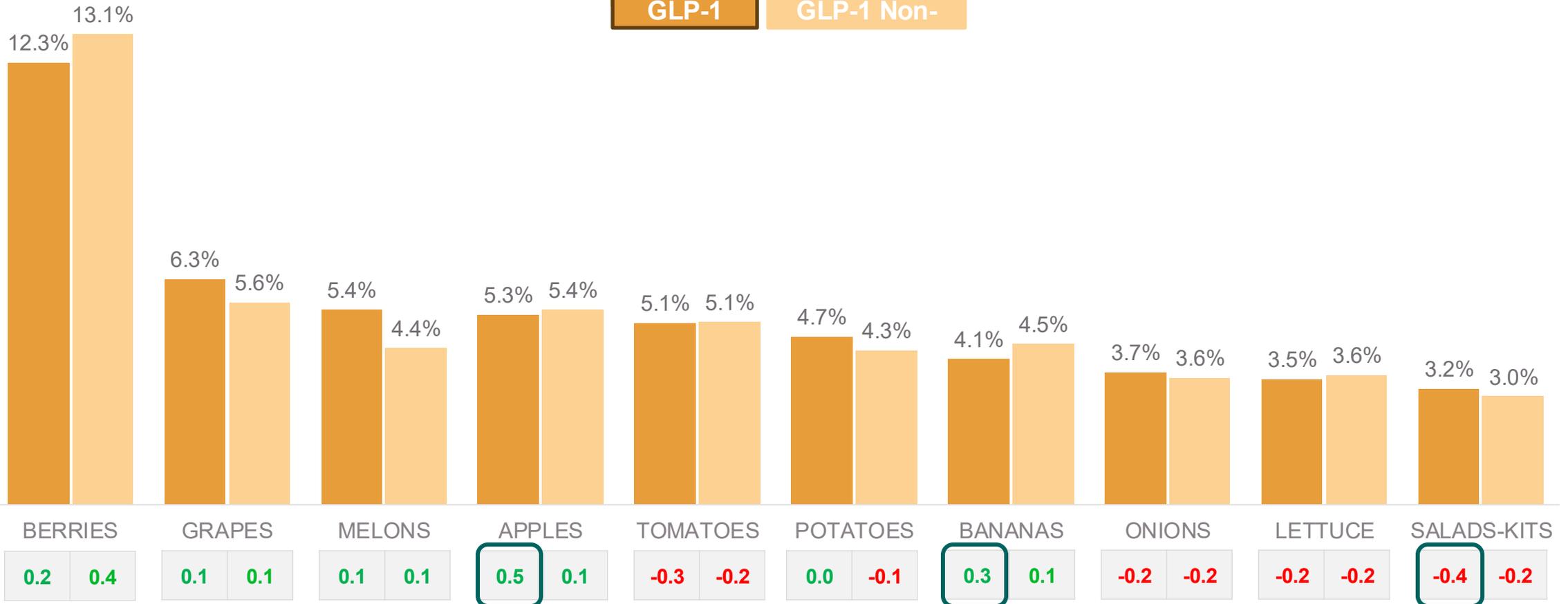
Top Produce Subcategories	Dollar % Change vs YAG		Unit % Change vs YAG	
	GLP-1 Users	Non-Users	GLP-1 Users	Non-Users
Berries	4.8	4.2	2.9	2.7
Grapes	4.6	3.7	7.8	6.1
Melons	5.1	3.6	8.6	4.2
Apples	13.6	3.3	8.1	0.4
Tomatoes	-3.0	-3.4	-0.9	-2.9
Potatoes	3.8	-1.7	4.6	-1.1
Bananas	11.6	3.1	8.3	1.7
Onions	-1.8	-4.2	0.4	-2.6
Lettuce	-2.2	-2.8	-2.8	-5.1
Salads-Kits	-9.2	-5.6	-7.1	-2.8



GLP-1 Users spend more on Grapes, Melons, and Potatoes versus Non-Users

Dollar Share – Contribution to Produce

GLP-1 GLP-1 Non-



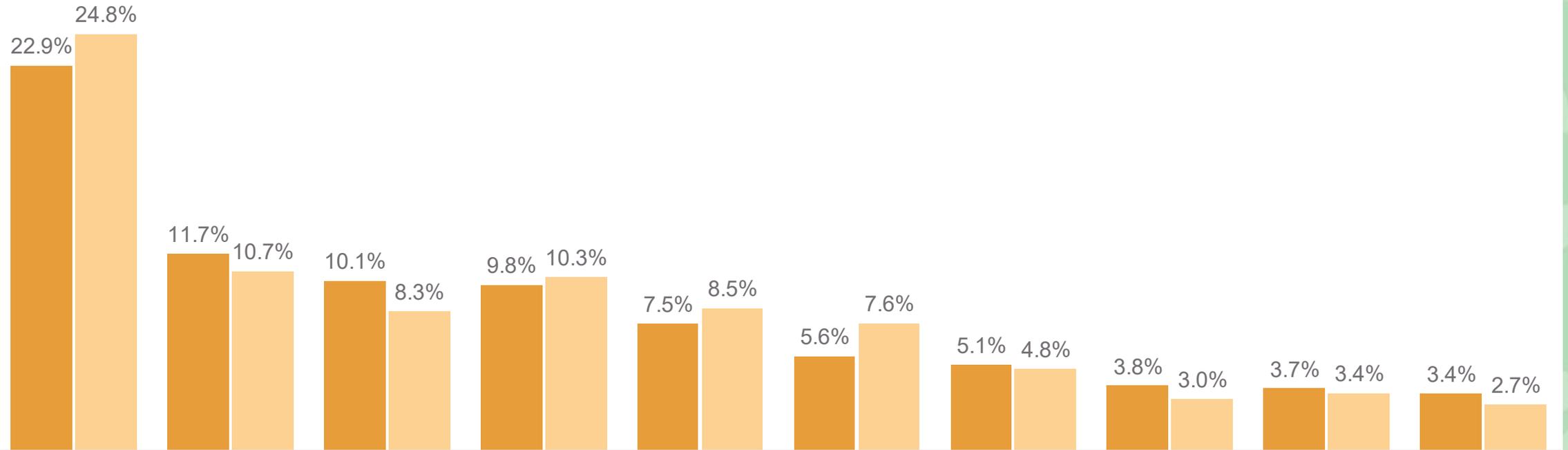
Cont. to Produce Chg vs YAG:



Among Fresh Fruit, Apples has the highest dollar share growth among GLP-1 Users, significantly outpacing Non GLP-1 Users

Dollar Share – Contribution to Fresh Fruit

GLP-1 GLP-1 Non-



Cont. to Fresh Fruit Chg YAG:

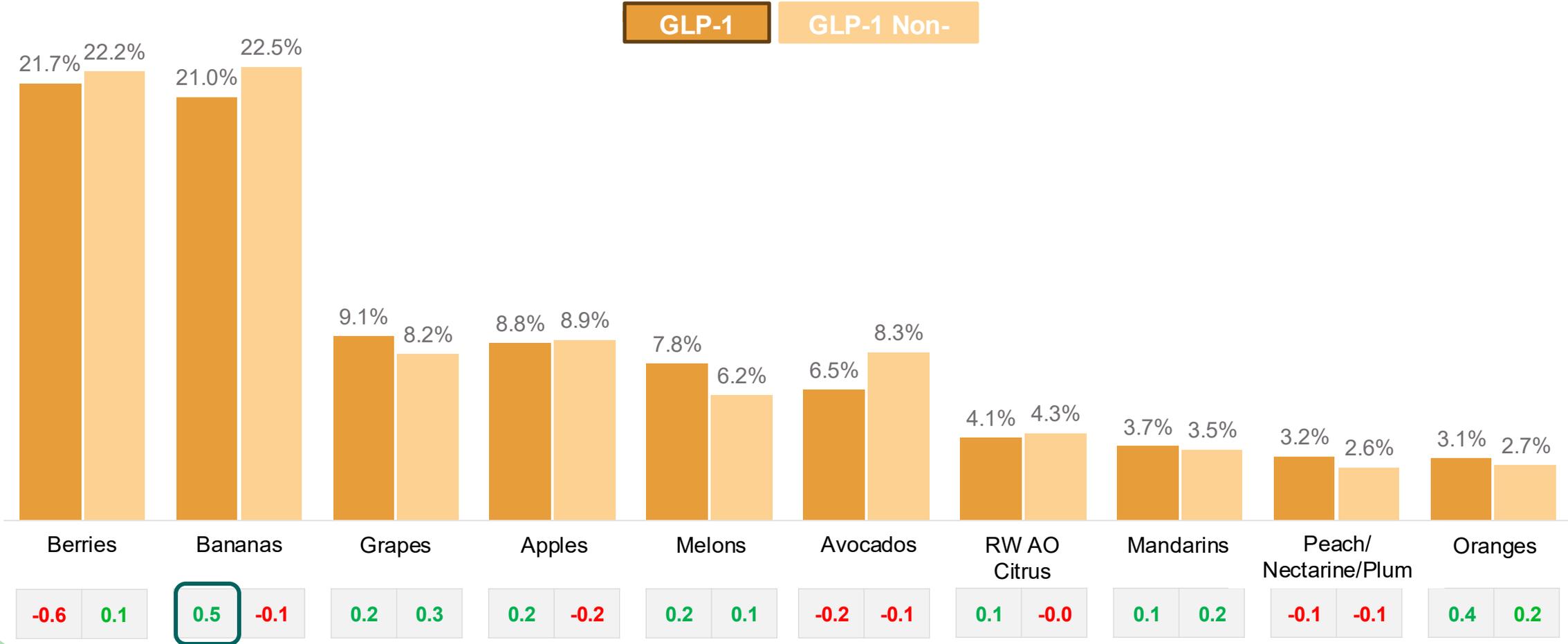
-0.4	0.0	-0.2	-0.0	0.6	-0.1	0.3	-0.1	-0.3	-0.3	0.0	-0.0	-0.0	-0.1	0.4	0.2	0.1	0.0
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GLP-1 users purchase Berries & Bananas most in Fresh Fruit category, but share is still larger in Non-Users

Unit Share – Contribution to Fresh Fruit

GLP-1 GLP-1 Non-



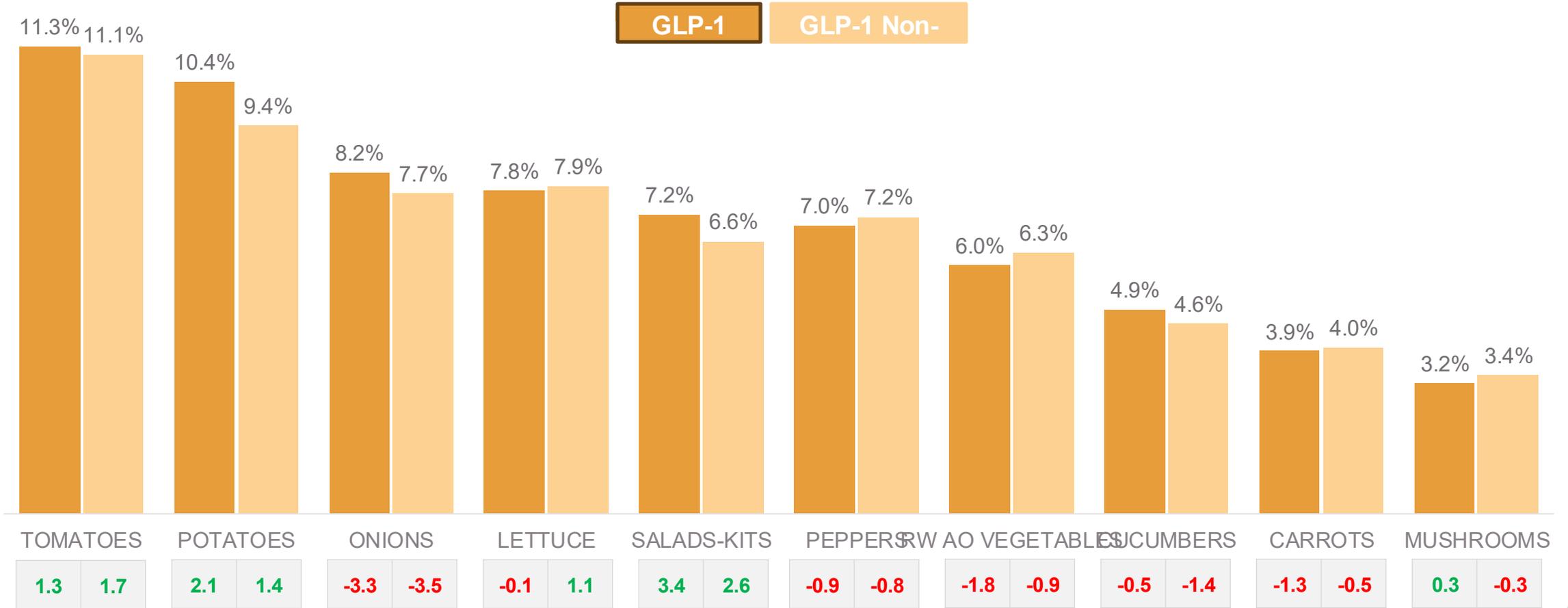
Chg YAG:



Tomatoes and Potatoes capture larger dollar share in GLP-1 Users compared to Non-Users with growth for both foods

Dollar Share – Contribution to Fresh Vegetables

GLP-1 GLP-1 Non-



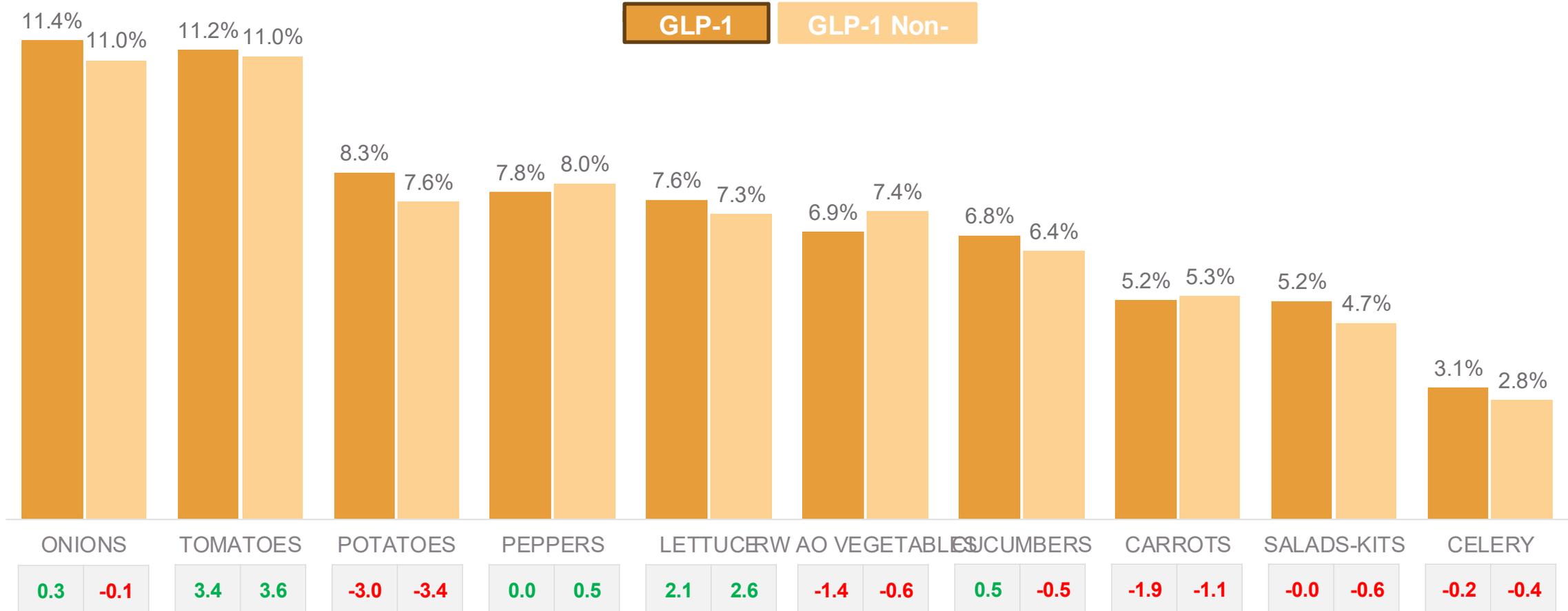
Chg YAG:



Onions and Tomatoes unit shares are higher for consumers using GLP-1

Unit Share – Contribution to Fresh Vegetables

GLP-1 GLP-1 Non-



Chg YAG:

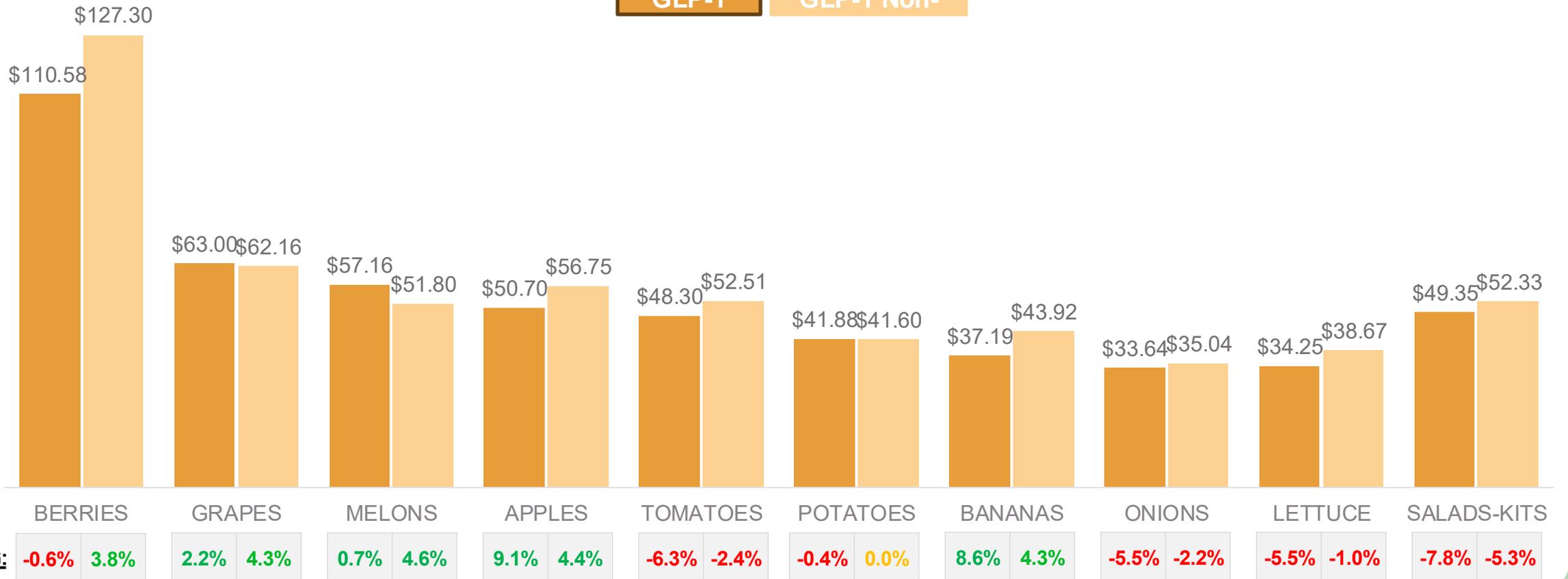
ONIONS	0.3	-0.1	TOMATOES	3.4	3.6	POTATOES	-3.0	-3.4	PEPPERS	0.0	0.5	LETTUCE	2.1	2.6	AO VEGETABLES	-1.4	-0.6	CUCUMBERS	0.5	-0.5	CARROTS	-1.9	-1.1	SALADS-KITS	-0.0	-0.6	CELERY	-0.2	-0.4
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Grapes, Melons, and Potatoes see a higher buy rate annually for GLP-1 consumers vs non-users

Dollars Spent per Buyer – Contribution to Produce

GLP-1 GLP-1 Non-



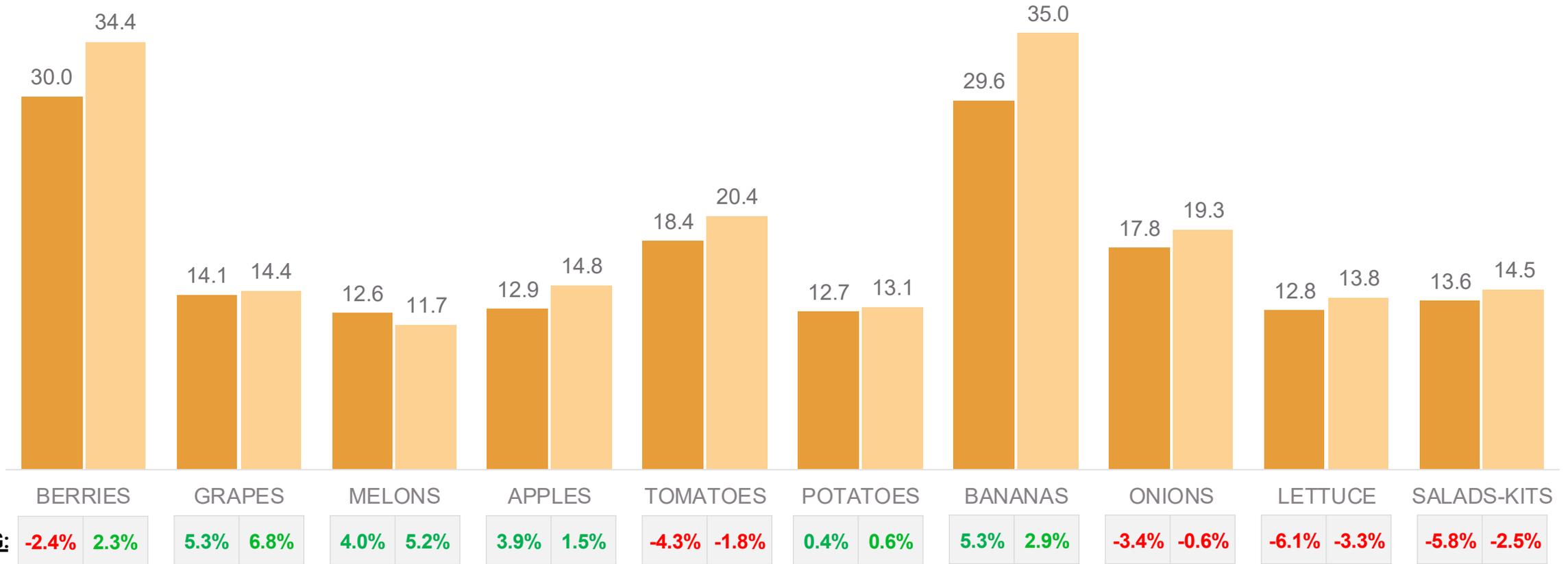
% Chg YAG:



GLP-1 Users buy more Melons compared to Non GLP-1 Users, with Berries and Bananas capturing the most units per buyer

Units Bought per Buyer – Contribution to Produce

GLP-1 GLP-1 Non-



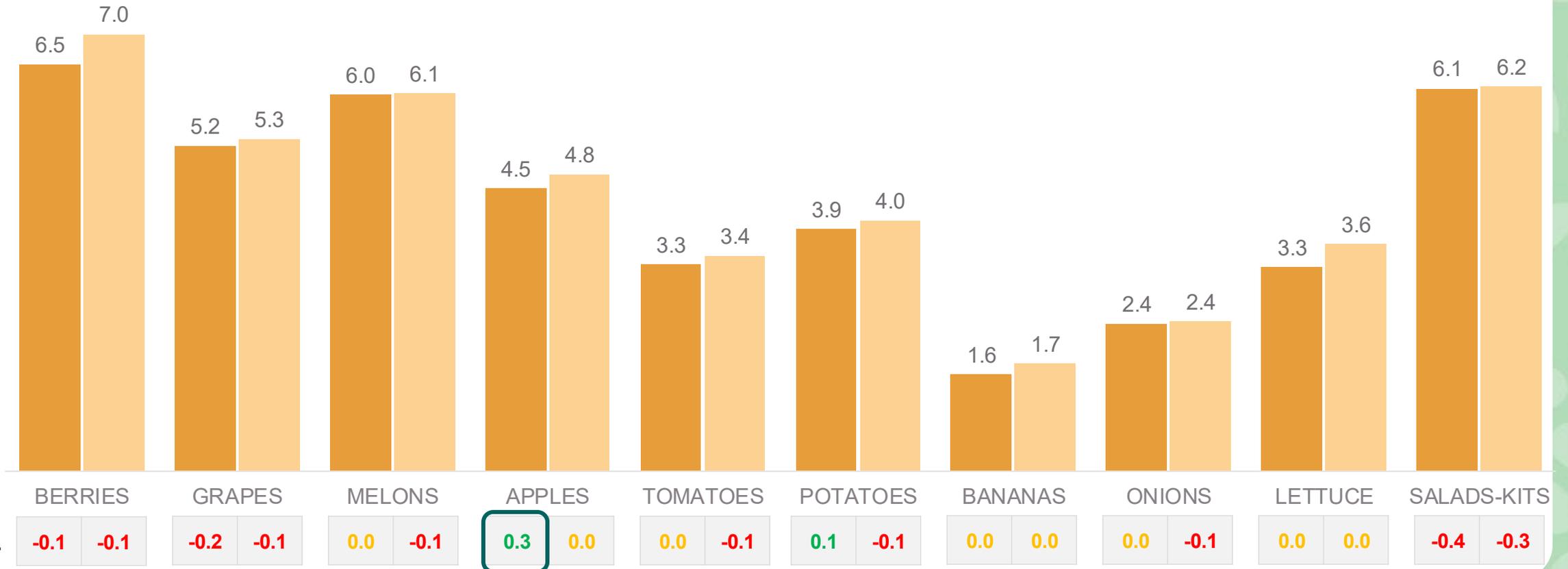
% Chg YAG:



Non-users spend slightly more of their basket on Produce versus GLP-1 Users

% of Basket Spent on Product – Contribution to Produce

GLP-1 GLP-1 Non-



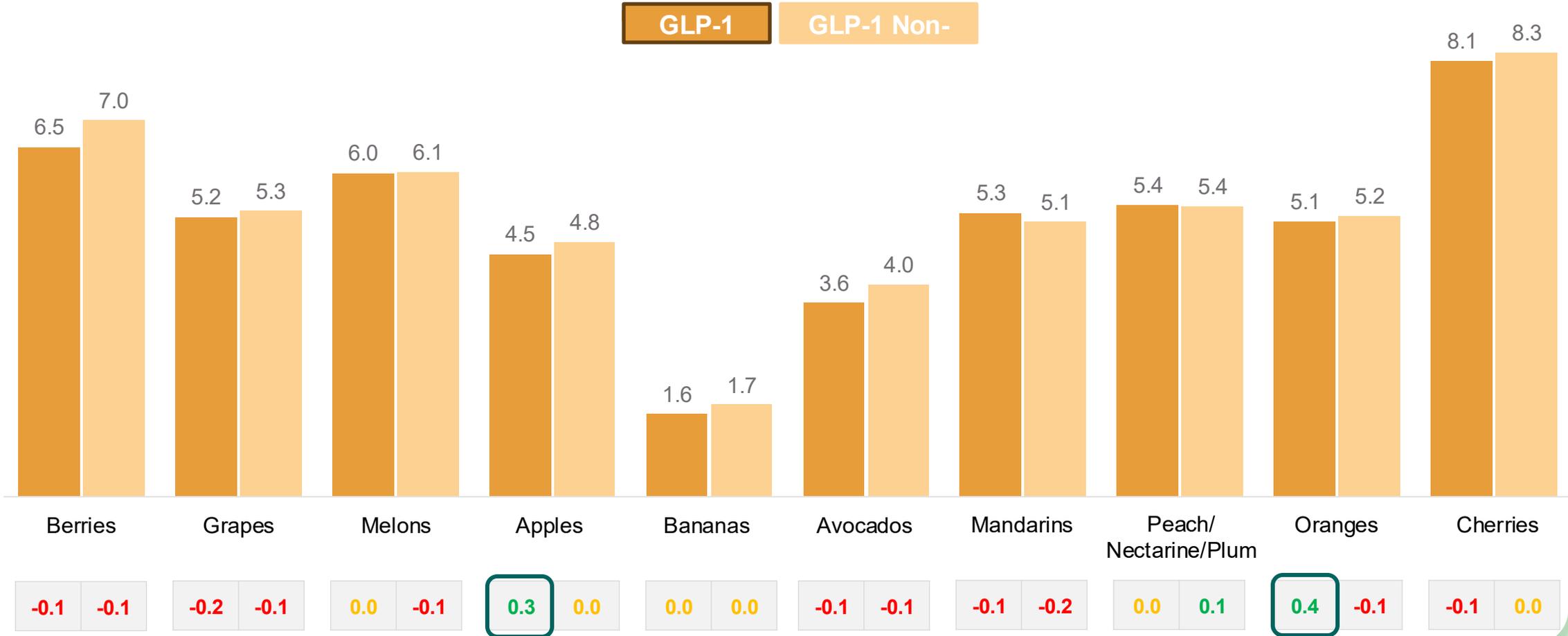
Chg YAG:



Within Fresh Fruit, GLP-1 Users spend more of their basket dollars on Mandarins compared to Non-Users

% of Basket Spent on Product – Contribution to Fresh Fruit

GLP-1 GLP-1 Non-





Non-users spend slightly more of their basket on Fresh Vegetables versus GLP-1 Users

% of Basket Spent on Product – Contribution to Fresh Vegetables

