# GLP-1's Impact on Beauty, Personal Care & Oral Care

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# Agenda

01 GLP-1 & The Changing Consumer

02 Ozempic Smell

03 Ozempic Mouth

04 Key Takeaways

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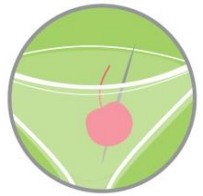
# GLP-1 & The Changing Consumer



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# GLP-1 Impacts Beauty & Personal Care

GLP-1 adoption is driving a "**self-care investment cycle**" where users **redirect savings from food and alcohol toward beauty and personal care pursuits**

GLP-1 households spend approximately **30% more on beauty products** than non-using households

Roughly **52%** of users **feel more positive about their appearance**, and **43%** are **motivated to take better care of it**

Source: Morning Consult, The GLP-1 Consumer Report

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# Ozempic Smell

- **GLP-1 drugs are unexpectedly altering users' sense of smell, dubbed the "Ozempic Smell" phenomenon**
  - Research suggests "Our **smell can be affected** by GLP-1 agonists - leading to **increased** or **decreased sensitivity**."
  - Research suggests that **80% of the flavors we taste come from what we smell**.

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# Ozempic Smell

- **A positive effect for some GLP-1 users is a growing interest in gourmand fragrances**

**Perfume sales are up 23%** as people seek **'sensory inputs' they no longer get from food**, per NIQ

Mintel reported a **24% increase in gourmand scents**

Trendalytics reported a **266% increase in social engagement** for **gourmand perfumes** vs. last year

**Gourmand fragrance searches rose by 170%** yoy since 2023, according to Spate

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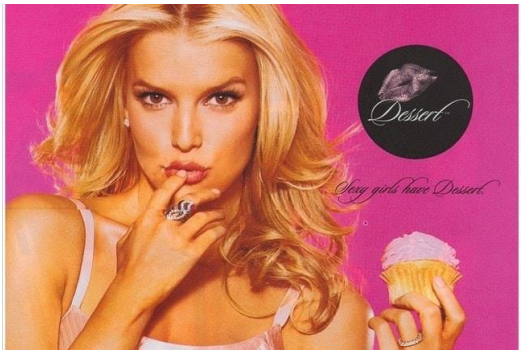
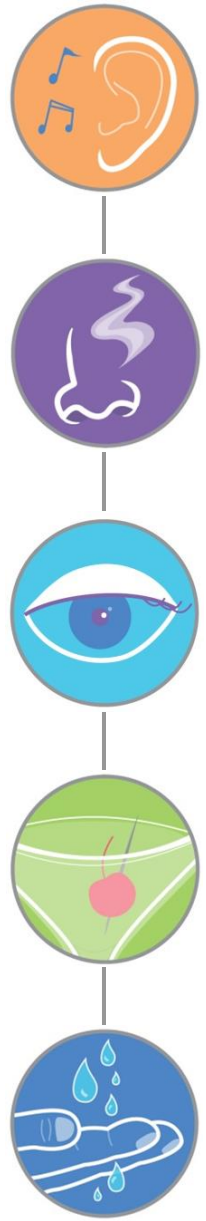
# Ozempic Smell – Edible Perfume

According to Spate, **edible perfume** has grown **+936.5%** vs. last year

TikTok holds an **83.8% popularity share** with a **1,000% growth**

There are **590.0** average **monthly searches** on **Google** and **299.2K** average **weekly views** on **TikTok**





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# Ozempic Smell

- A negative effect for some GLP-1 users is hyperosmia, a heightened sense of smell that can cause discomfort, nausea, vomiting or headaches

Favorite scents "now feel off, unfamiliar, or oddly intense"

"GLP-1 drugs' side effects, such as nausea, are greater in those with better taste and smell"

Three additional ripple effects of these medications include drier skin, body odor, and sensitive skin

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# Ozempic Smell Unmet Needs

- **Fragrance Opportunities**
  - Tailored gourmand scents
  - Edible Perfumes
  - Functional fragrances that ease nausea
  - Functional air care scents that neutralize malodors
  - All over deodorant sprays addressing “eggy” smells
  - Hypoallergenic and sensitive skin scents, i.e., alcohol-free and solids

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# Ozempic Mouth

- GLP-1 drugs are known to **disrupt the gastrointestinal (GI) system by slowing digestion**
- GLP-1 users report "**Ozempic mouth**" or "**Ozempic breath**," a **dry mouth** side effect that causes **bad breath**, described as a **rotten egg-like odor**
- Some GLP-1 users experience a **metallic or bitter taste** referred to as "**Ozempic Tongue**"
- **Tooth decay** is an additional **potential risk**

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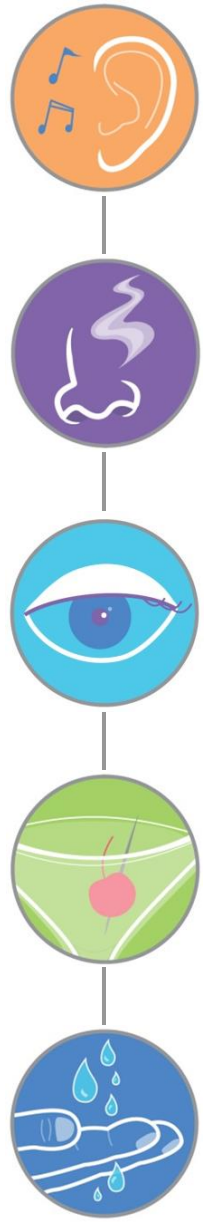
# Ozempic Mouth

A Talker Research and Crest survey found that **65%** of Americans **question whether they have bad breath at least once a day**, while **91% link fresh breath to higher confidence**

Retails sales for Hershey's third-largest confection brand, **Ice Breakers, increased over 8% in the quarter**



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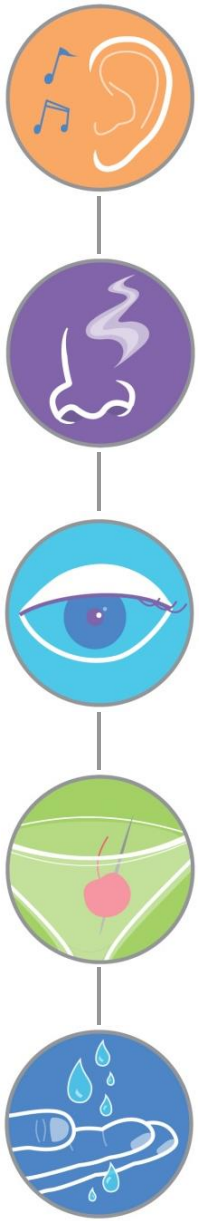
# Ozempic Mouth Unmet Needs

- **Oral Care Opportunities**
  - Focus on the oral microbiome
  - Toothpaste, mouthwash, and sprays to address dry mouth and bad breath
  - Functional chewing gum, mints, and lollipops
  - Formulas fortified with functional ingredients, i.e., fluoride, vitamins C, D, B, calcium, and magnesium
  - Gourmand flavor toothpastes



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# Key Takeaways

- Consumers' use of GLP-1 drugs for weight loss is evolving. **GLP-1 drugs are impacting consumers' relationships** with **food and beverages**, **tastes**, **beauty and personal care** use, and **purchasing patterns**. In addition, with the rapid weight loss, individuals face **emotional challenges**, including **shifts in their relationships**, **social life**, **routines**, and **body image**.

- For brands and manufacturers, two areas of opportunity are **fragrance applications** and **oral care**. Innovation is ripe for this market.

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# thank you!

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