

Case study

Assessment of GLP-1 impact on the food industry helped client cement thought leadership



Background



- A global sell-side client required insights into the impact of GLP-1 (glucagon-like peptide-1) on their coverage companies
- The client also wanted to estimate the impact on sales at the company, brand and category level
- However, as GLP-1 penetration is still in its infancy, accessing meaningful data was a challenge

Crisil Integral IQ solution



- The team undertook secondary as well as primary research on GLP-1 and its impact on the food industry, with particular focus on European food companies (Nestle, Unilever, and Danone)
 - We closely tracked drug-related news, user comments on social media forums, and management commentary of companies under coverage
 - We also hosted a focus group meeting with eight current GLP-1 drug users to get their perspective and incorporated those into our analysis
- Based on secondary and primary research, we prepared an impact assessment that analyzed the exposure of coverage companies to various food categories (e.g., pizzas, chocolates, yoghurts, waters, etc.)
- The team's detailed qualitative comments were included in the client's sector note

Client impact



- Our analysis helped the client remain ahead of the curve by providing accurate and timely analysis on an emerging class of medication
- The sector note generated considerable interest among investors and led to multiple requests for custom analysis, positioning the client as a thought leader in the space

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