A FIELD GUIDE FOR BRANDS

The Shrinking Basket

The basket is shrinking;
the opportunity is not.



15–30%
Calorie reduction among GLP-1 users

5–8%
Grocery spend decline in first six months

10-15%
Of U.S. adults projected on GLP-1 within 5 years

30–40%
Of food wasted at home (USDA)

Something shifted.

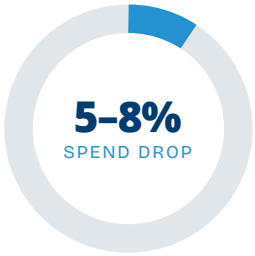
Walk the canned goods aisle of any grocery store right now, and you will see the same thing: less in the cart. Consumers are buying fewer units, finishing what they have before buying more, and thinking harder about every item they put in the basket. The pantry-loading behavior that drove center store volume for years is gone, and it did not leave a forwarding address.

Two forces landed at the same time and hit the same household budget.

The first is economic. Three consecutive years of elevated food prices, rising input costs from steel tariffs, and a consumer confidence index near a decade low have made the American shopper more deliberate and less forgiving than at any point in recent memory.

The second is biological. GLP-1, the class of medications behind Ozempic and Wegovy, is permanently changing how tens of millions of people think about eating. Users consume 15–30% fewer calories. Grocery spending drops 5–8% within the first six months of treatment. And the behavioral shift often outlasts the prescription.





What these two forces share is more important than what separates them. They are both producing a consumer who wants less volume, more value, and food they can actually trust. That consumer, standing in the canned goods aisle, has a nutritional problem they may not even be aware of yet. GLP-1 drugs reduce appetite across the board, including the appetite for protein, fiber, and the vitamins that keep muscle and bone density intact. The foods that answer that problem most directly and most affordably are sitting right there on the shelf.



The case for canned goods has never been stronger. Why are most brands not yet seizing the opportunity?

Sources: Circana GLP-1 Consumer Study 2024-2025 · USDA Economic Research Service · University of Michigan Consumer Sentiment Index

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The grocery aisle was already under pressure before GLP-1 became a household word.

In the spring of 2025, the United States raised its tariff on imported steel to 50%. That sounds like a trade policy story. For the canned goods industry, it was something more immediate. Approximately 80% of the tinplate used to make steel food cans in the U.S. is imported. Industry analysts estimated retail prices on canned goods would rise by 9–15% over the following 12 to 18 months, a significant hit for a category that has always competed on affordability.

The tariff did not arrive in a vacuum.

By mid-2025, cumulative food-at-home inflation since 2022 had reached roughly 10%. Food volume growth in the first half of 2025 sat at just 0.2%, against price inflation of 3%. Consumers were paying more for groceries and buying less of them, not because of medications, but because three years of elevated prices had fundamentally changed their spending habits.

The University of Michigan Consumer Sentiment Index fell to 58.2 in August 2025, near a decade low. When confidence drops that far, consumers stop buying ahead. They stop stocking pantries. Impulse decisions at the shelf disappear.

Three years of adaptation do not undo themselves in a quarter.

The consumer who recalibrated their spending in 2022 developed habits: smaller purchases, less waste, more scrutiny at the shelf. Those habits have become the new baseline, and GLP-1 medications are now reinforcing them in millions of additional households.

Brand earnings calls confirmed what the data was showing.

KRAFT HEINZ

-1.5% to -3.5%

2025 organic net sales outlook revised · Q2 2025 earnings

CONAGRA BRANDS

$200M +

Incremental cost increase projected for fiscal 2026

DEL MONTE FOODS

Chapter 11

Filed July 2025 · Rising costs + sustained volume pressure

Every purchase becomes a deliberate one

Sources: American Action Forum 2025 (steel tariffs) · Consumer Brands Association 2025 (tinplate import share) · USDA ERS (food-at-home inflation) · Circana H1 2025 retail data · University of Michigan Consumer Sentiment Index, Aug 2025 · Kraft Heinz Q2 2025 earnings · Conagra Q4 2025 investor presentation · Reuters, July 2025 (Del Monte)

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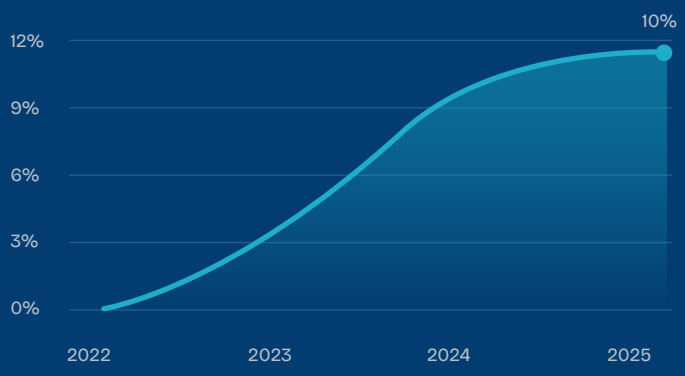
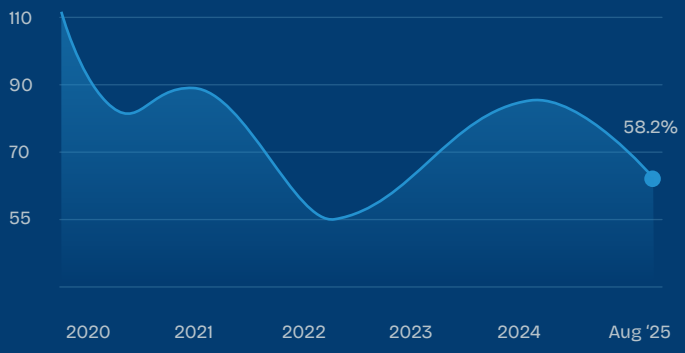
Four forces reshaping the consumer before GLP-1 even arrived.

Force 1: Food at home inflation



Force 2: Consumer sentiment index



Force 3: Food volume vs. Price growth

Volume Growth **+ 0.2%**

Consumers buying units at near-flat growth rate

Price Growth **+ 3.0%**

15× more price growth than unit volume

Force 4: Tarriffs

+50%

Steel import tariff
Spring 2025

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GLP-1 medications don't just reduce appetite, they create a nutritional problem. And an opportunity.

GLP-1 agonists work by mimicking a gut hormone that signals fullness to the brain. People on these medications eat less, eat less often, and buy less food. Household grocery spending drops 5–8% within the first six months of treatment. Calorie intake drops 15–30%. These are not incremental changes. They are behavioral shifts that happen fast and tend to stick.

Multiple research firms project that 10–15% of the U.S. adult population could be on some form of GLP-1 therapy within five years. That is tens of millions of grocery shoppers permanently changing their relationship with food and their relationship with the center store.

The part that the packaged food industry has not absorbed yet.

GLP-1 drugs do not selectively reduce appetite for empty calories. They reduce appetite across the board. A user who drops from 2,500 calories a day to 1,800 is also consuming significantly less protein, less fiber, fewer vitamins, and fewer minerals.

Clinical research has documented the consequences: accelerated muscle density loss, reduced bone strength, and fatigue. These are not theoretical risks. They are showing up in patient data at a rate that is prompting physicians and nutritionists to actively counsel GLP-1 patients on how to manage nutrient intake while on the drugs. That creates a real, specific, and largely unaddressed nutritional problem for a growing share of the consumer population.

Canned goods, positioned correctly, are one of the most direct answers to that problem at any price point.

15g PROTEIN — **Black beans (15 oz.)**
Also 15g fiber · 4 servings · Shelf-stable

#1 OMEGA-3 — **Canned Wild Salmon**
Highest omega-3 + protein per dollar on shelf

≈0 CALORIES — **Diced Tomatoes**
Lycopene · Vitamin C · Antioxidants

For someone eating 30% less than they used to, these are not convenience items. They are some of the most nutrient-efficient foods in the grocery store.

Sources: Circana GLP-1 Consumer Study 2024-2025 · Clinical literature on GLP-1 nutritional consequences (multiple peer-reviewed sources, available on request)

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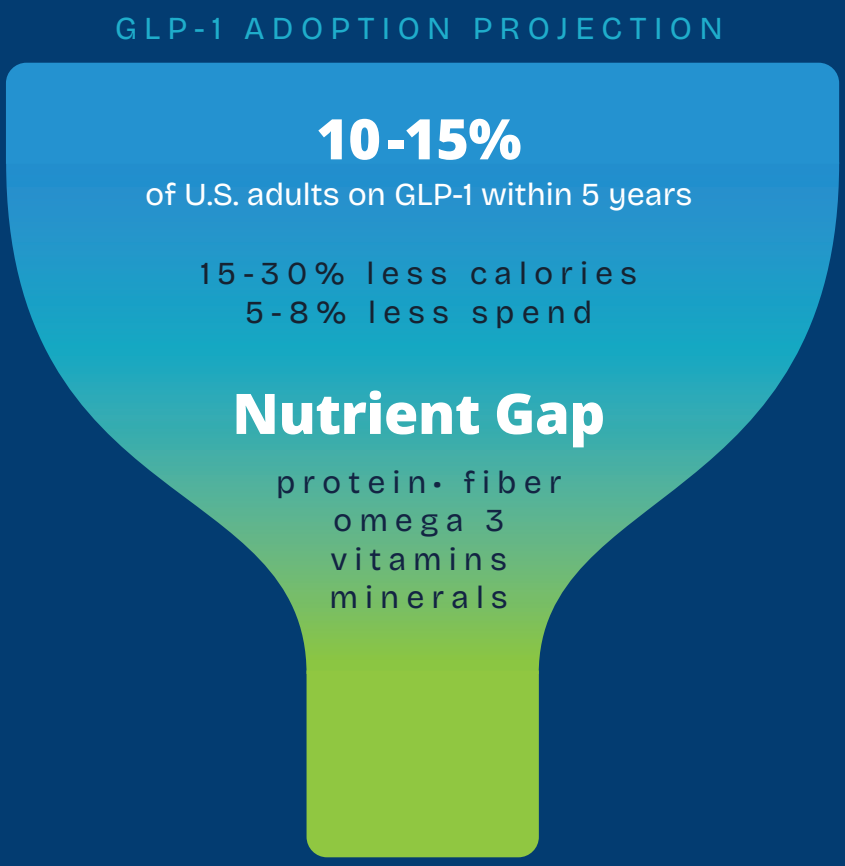
Tens of millions of shoppers with a specific nutritional need, canned goods are the answer.



The GLP-1 funnel creates a direct, traceable path from drug adoption to grocery behavior to nutritional need, and ends at the exact product format best positioned to fill that need.

The brands that recognize this early and start telling that nutritional story clearly and credibly will own a conversation that is just beginning to surface in consumer health media.

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What is actually happening at the shelf right now.

2019 Basket · High volume

MINDSET · Volume-driven · Pantry-loading · Impulse

- Multipacks + bulk variety packs
- Seasonal stockpiling for guests
- Endcap impulse items added on habit
- Promotional bulk buying on deals
- Extra buffer "just in case"

2025 Basket · Intentional

MINDSET · Value-driven · Exact-use · Zero waste

- Single-serve + exact-portion formats only
- Deliberate, needs-based staple selection
- Value-per-bite calculated at shelf or on phone
- Zero-waste, resealable formats preferred
- No buffer: buying for exactly what's needed

Circana's 2025 tracking shows consumers buying fewer units per trip while placing far greater emphasis on value per bite, a phrase that did not exist in brand management vocabulary five years ago. Grocery sales growth came in under 1% in mid-2025, while foodservice traffic was down approximately 2% year over year as consumers shifted toward eating at home and spending less when they did. The dynamic is unusual: more at-home eating occasions, smaller baskets per occasion.

The impulse purchase has effectively disappeared from the center store. The consumer who used to add an extra can of soup or a multipack of vegetables because it was on an endcap display is now pausing at that decision, asking whether they will actually finish it, calculating cost per serving in their head, or on their phone. Brands that relied on endcap placement and promotional pricing to drive trial are finding that trial does not convert to repeat at the rates it used to. Seasonal behavior has compressed. Summer used to drive bulk purchases for entertaining. Consumers still entertain but they buy for exactly what they need, not a buffer for extra guests. Single-serve and two-serve formats that were considered niche two years ago have become expected.

The food waste data is one of the most underused numbers in the category. USDA estimates that 30–40% of food purchased for home use is ultimately wasted. For years, the industry treated that as an environmental problem. For the 2025 consumer, it has become a personal financial problem. Consumers who waste a product repeatedly do not repurchase it. They find a format they can finish. Brands that have not audited their SKU lineup for waste risk are sitting on churn that has not fully surfaced in their velocity data yet.

Sources: Circana 2025 retail purchasing behavior and unit trend data · BMO Capital Markets consumer spending analysis 2025 · USDA household food waste estimate

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The can has a better story than anyone is currently telling.

The conventional response to a volume decline in packaged food is to right-size the package. Make the can smaller, sell less for less, and follow the consumer down.

That instinct misreads the moment.

The consumer buying fewer units is not asking for a smaller package at the same price. That formula is called shrinkflation, and it is one of the most consistently resented practices in consumer packaged goods. Brands that quietly reduced package size during the 2022 to 2024 inflation cycle paid a credibility tax that many are still paying. Doing it again, without a clear and transparent consumer-facing explanation of why, is likely to cost shelf position rather than protect it.

Steel and paper cans already serve the one-to-two-person household. A standard 15-oz. can of beans serves two people. A 14.5-oz. can of diced tomatoes fits one recipe. The format problem is largely solved. The story problem is not.

Three chapters of that story that are almost entirely untold

01 • FRESHNESS

Packed within hours of harvest.

Leading canned vegetable and fruit processors pack within hours of harvest, not days or weeks. Tomatoes that go into a can are picked ripe and processed the same day. Green beans go from field to can in under 24 hours at peak-quality facilities. Compare that to the fresh produce aisle: picked green to survive a multi-week supply chain, ripened in transit, and sitting on a refrigerated shelf that has been open to a store environment for days. In many cases, canned is the more nutritious option. That story is not being told on the shelf.

02 • NUTRITION

Every calorie must carry weight.

For someone on a GLP-1 medication, eating 30% fewer calories than before, every calorie needs to carry nutritional weight. Canned beans, canned fish, canned vegetables, and canned legumes are among the most nutrient-dense, calorie-efficient foods available at any price point in the grocery store. The brands that position their products as solutions to the GLP-1 nutrition gap, clearly and credibly, will own a conversation that is just beginning to surface in consumer health media.

03 • VALUE FOR MONEY

The strongest value argument in the store.

A can of black beans costs under two dollars and delivers four servings of protein and fiber. At a time when consumer confidence is near a decade low, and grocery budgets are stretched from three years of price increases, this is not background context. It is the strongest value argument in the store. Most canned food brands underplay it entirely, treating affordability as a feature of last resort rather than a genuine competitive advantage.

Sources: Steel Recycling Institute (U.S. steel recycling rate) · Sonoco Products Company heritage data · Industry processing timelines from co-manufacturing partners

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What Sonoco brings to this moment.

Sonoco has been making packaging that carries exactly these stories for more than 125 years. As one of the world'slargest diversified packaging companies, with manufacturing operations across the Americas and the technical depth to customize formats at scale, Sonoco brings three things to this moment that most packaging suppliers cannot.

01 • FLEXIBILITY

Format flexibility without supply chain risk.

Sonoco's domestic steel can production supports brands that need to move quickly, testing new sizes, adjusting pack configurations, and scaling what works within a single selling season rather than waiting for a two-year tooling cycle. The current trade environment makes domestic production capacity a strategic asset, not a preference.

02 • PARTNERSHIP

A partnership model that goes beyond the transaction.

Sonoco works with brands at the strategy level, not just as a supplier of cans but as a partner in understanding what the next format decision needs to accomplish commercially. That is the role a manufacturer with Sonoco's scale and institutional knowledge is positioned to play, and it is the role the current market demands.

02 • ALIGNMENT

Two proven platforms aligned with where the consumer is going.



Steel cans, right-sized, customizable, engineered for pantry staples, vegetables, beans, and soups, serve smaller households and single-recipe occasions without the **shrinkflation** perception risk.



Paper cans bring sustainable, customizable formats to dry goods and snacks, supporting the value-per-bite story consumers now demand at the shelf.

Steel food cans are BPA-free; something most consumers do not know, and most brands do not say clearly enough on-pack.

Sources: Circana GLP-1 Consumer Study 2024-2025 · USDA Economic Research Service · University of Michigan Consumer Sentiment Index

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The brand readiness checklist.

Sonoco's team developed the following checklist in direct response to what we are seeing across brand partners in the Americas. It is not a strategic framework; it is a practical diagnostic exercise. Work through it with your packaging and marketing teams. If fewer than five of these are true of your current lineup, your packaging strategy has become your growth problem.

☐ **01** PORTION

Are our shelf-stable formats sized for smaller, more frequent use?

If your smallest pack still serves four, you're losing the GLP-1 household.

☐ **02** RESEAL

Can the consumer close it, save it, and finish it later without waste?

Resealability now disqualifies products before purchase, not after.

☐ **03** VALUE

Does the pack communicate value-per-bite at a glance on shelf?

Consumers are doing math now. Make the answer obvious.

☐ **04** OCCASION

Is there a portable format for summer and on-the-go moments?

Travel size, single serve and portability will win at shelf.

☐ **05** PANTRY

Does our SKU lineup include a single-serve or right-sized format?

Steel and paper cans are well-positioned to protect and serve on the go.

☐ **06** WASTE

Have we audited which SKUs drive household waste and quietly lose repeat?

A 30–40% home waste rate is a churn signal hiding in plain sight.

☐ **07** SUSTAINABLE

Does our packaging story align with how consumers now define value?

Sustainability is no longer a premium tier, it's table stakes.

☐ **08** SPEED

Can we test, refine, and scale a new format in one selling cycle?

The window to defend share is shorter than the window to study it.

Fewer than 5 boxes checked?
Your packaging strategy is now your growth strategy.

Sonoco can help you figure out where to start.

 Sources: Steel Recycling Institute (U.S. steel recycling rate) · Sonoco Products Company heritage data · Industry processing timelines from co-manufacturing partners

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The Center Store Choice.

The grocery store is not returning to 2019.

The consumer is not going back to pantry-loading or impulse buying or the kind of seasonal stocking behavior that padded volume for decades. Those habits were changed by inflation, reshaped by a tighter economy, and now reinforced by medications that are becoming a permanent feature of how a significant portion of the population eats.

What this creates, for the brands willing to see it clearly, is one of the better commercial opportunities the canned goods category has seen in a long time. The consumer who is more deliberate, more value-conscious, and more focused on nutritional quality is the consumer for whom a well-told canned goods story is built.

The format is right. The price is right. The nutrition case is real and underexploited. The freshness story is true and almost entirely untold.

What has been missing is the will to tell these stories directly, specifically, and with enough confidence to change how the category is perceived. We are one of the world's largest diversified packaging companies, with manufacturing operations across North and Latin America, technical expertise in steel and paper can production that runs deeper than any other supplier in the category, and a track record of helping brands move quickly from concept to shelf.
We have the domestic production footprint that the current trade environment makes more valuable by the day, and the format range to serve every part of the consumer shift described in this paper.

More than that, we work at the strategy level with the brands we partner with. The conversations we have with category teams are not about can specifications. They are about what the consumer needs to see, believe, and feel at the point of decision, and what packaging can do to make that happen. That is the kind of partnership that matters right now, when the window to move is shorter than most planning cycles.

Sonoco has been in this business for more than 125 years. We have seen the center store go through recessions, supply shocks, consumer behavior cycles, and the entrance of entirely new product categories.

The brands that step into this moment with a clear freshness story, a credible nutrition message, a transparent cost-per-serving, and packaging that carries all of it at a glance are not settling for a defensive position. They are taking one of the strongest offensive positions available in the grocery store.

Sonoco is ready to help build that position. We have been building it, in one form or another, for more than a century.

To continue this conversation: consumerpackagingamericas@sonoco.com

Sonoco Products Company: founded 1899. Publicly traded (NYSE: SON). Operations in 30+ countries.
One of the world's largest diversified packaging companies.

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