



## UPLAND

Foresight · Strategy · Innovation

### FOR IMMEDIATE RELEASE

March 31, 2026 | Contact: Jacqueline Holliday | [Jacqueline.holliday@uplandstrategy.co](mailto:Jacqueline.holliday@uplandstrategy.co) | 734-221-3861

## GLP-1 Is Changing How America Eats, Not Just How Much

*New research from Upland finds that GLP-1's real disruption isn't caloric, it's the behavioral shifts. Occasions collapse, what's in grocery baskets shifts, and a fragile lapsed-user population is already reshaping food and beverage demand in ways most manufacturers have yet to model.*

Millions of Americans are currently taking GLP-1 medications. Millions more are actively considering starting GLP-1. And a significant population has already tried them and stopped. These three distinct consumer groups each have a different relationship to the same disruption and together, they represent one of the most consequential demand shifts the food and beverage industry has faced in a generation.

Most food manufacturers and restaurants however are still tracking the wrong signal. The industry has largely modeled GLP-1's impact as a weight loss story, focused on a reduction in calories consumed and shrinking portion sizes. New research from Upland, a foresight and strategy consultancy, reveals a more fundamental disruption: GLP-1 is rewiring the behavioral relationship between Americans and food, and the commercial consequences are already visible in the data.

Upland's proprietary consumer intelligence platform, The Hunger Index™, surveyed 1,600 U.S. consumers including current GLP-1 users, near-adopters, and lapsed users and isolated five behavioral signals driving category-level disruption across food and beverage.

### The On-Ramp Is Psychological, Not Just Clinical

Understanding why consumers start GLP-1 matters as much as understanding what happens after. The decision to begin is as emotional as it is physical. Yes, people want to lose weight but they also want to stop thinking about food constantly, break a cycle they've been unable to break on their own, and reclaim a sense of control they describe as having lost. The medication, for many, is replacing a coping mechanism as much as it is suppressing an appetite. That distinction has profound implications for what categories stand to lose and why.

### Occasion Collapse: Where the Commercial Pain Begins

The most immediate commercial signal in The Hunger Index™ data is not category-level sales decline. It is occasion collapse — the disappearance of the eating moments that categories depend on. Among GLP-1 users:

- 64.0% have cut back on snacks



- 62.8% are eating dessert less often or in smaller portions
- 54.2% are consuming dinner less frequently
- 64.2% have reduced fast-food consumption
- 53.7% are ordering carryout or delivery less often

People don't stop buying chips in one dramatic moment. They stop having the 3pm snack occasion that chips lived in. The ritual disappears before the product does, which means the sales data lags the behavioral shift by months. Brands that wait for the numbers to move are already behind.

Emotional consumption is being disrupted at a greater rate than physical appetite. More than half of GLP-1 users named candy and chocolate as a top comfort food before starting the medication. That is precisely the kind of purchase the dopamine mechanism disrupts. The brands most exposed are not necessarily those with the highest calorie counts, they are the ones whose value proposition lives in the emotional occasions GLP-1 is now chemically rewiring.

*"GLP-1 users aren't just eating smaller portions. They're changing their relationship with food as comfort, reward, and ritual. GLP-1 doesn't just suppress appetite; it rewires the reward that drove the behavior in the first place. These aren't incidental category losses. They're structural ones."*

— Jacqueline Holliday, President, Upland

## The Grocery Basket Is Being Rebuilt

The flip side of occasion collapse is satiety substitution: the basket isn't simply smaller, it's different. GLP-1 users are gravitating toward fresh produce, proteins like chicken, and whole foods more broadly — categories that work with their new physiology rather than against it. They are cooking more intentionally and buying with a different decision framework than they had before.

This shift is the opportunity signal that most CPG manufacturers are missing while focused on the losses. The Hunger Index™ identifies which categories most at risk and where categories are positioned to capture displaced consumption.

*"The brands that will win through this shift are the ones that move from monitoring to strategy now. The Hunger Index™ exists to make that possible."*

— Jacqueline Holliday, President, Upland

## Making It Measurable: The Hunger Index™

The Hunger Index™ is Upland's proprietary consumer intelligence platform, scoring food and beverage categories against five behavioral signals: Craving Reduction, Portion Reduction, Occasion Decline, Emotional Consumption Disruption, and Satiety Substitution. The resulting Category Impact Matrix identifies structural risk and opportunity across major food and beverage segments.

The platform is built on original survey research of 1,600 U.S. consumers, including current GLP-1 users, near-adopters, and lapsed users. Unlike syndicated market data that tracks



adoption rates or broad purchase shifts, The Hunger Index™ was designed to isolate the behavioral mechanisms driving disruption not just what is changing, but why.

### **Access and Availability**

The Hunger Index™ inaugural report is available now to CPG executives and strategy teams. The Food Disruption Index is available to CPG manufacturers and restaurant operators seeking category- and channel-level analysis. Organizations seeking access or custom category work should contact Upland directly. Upland is also available for speaking engagements to present findings at industry events.

---

### **About Upland**

Upland is a CPG foresight and strategy consultancy serving multinational clients across the consumer products sector and restaurants. The firm specializes in translating emerging consumer behavior into actionable commercial strategy.

###

Contact: [Media contact: Jacqueline Holliday | [Jacqueline.holliday@uplandstrategy.co](mailto:Jacqueline.holliday@uplandstrategy.co) | 734-221-3860  
[www.uplandstrategy.co](http://www.uplandstrategy.co)