

# The fastest-growing F&B brands in America went from TikTok to Whole Foods in *under 18 months*. The playbook is now transferable.

Six shifts, three case studies, an interactive readiness assessment, and a seven-step 90-day plan — for founders and CMOs of food, beverage, functional nutrition, and better-for-you brands compressing the path from digital launch to national retail distribution.

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READ 13 MIN

BY 5W CONSUMER BRANDS PRACTICE

2x+

TIKTOK SHOP F&B CATEGORY YOY GROWTH  
2025 – MODERNRETAIL

18 mo

TYPICAL DIGITAL-TO-WHOLE-FOODS ARC  
FOR BREAKOUT F&B BRANDS

4.7%

\$500M+

## EXECUTIVE SUMMARY

The arc from food and beverage launch to national retail distribution has compressed from four-to-six years into roughly eighteen months. Poppi, Liquid Death, Chamberlain Coffee, OLIPOP, Athletic Brewing, Prime, Waterboy, and Cirkul are all operating in a pattern that did not exist in 2015: creator-led digital launch generates the velocity signal that retail buyers at Whole Foods, Target, Sprouts, and Walmart now actively track, which generates the category-review meeting, which generates shelf space, which generates paid media justification, which compounds further.

This playbook is built for the F&B founder or CMO who has seen the pattern work for competitors and wants a realistic 90-day plan to run it — including the GLP-1 category repositioning question that most legacy F&B brands are not yet asking and every emerging brand is built around.

## § 01 / TRENDS

Six shifts reshaping *food and beverage* growth in 2026.

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# 01

## The digital-to-retail path has compressed to 18 months.

TikTok Shop's U.S. food and beverage category more than doubled year-over-year in 2025. Brands moving from launch to Whole Foods, Target, or Walmart distribution in under 18 months — Poppi, Liquid Death, Chamberlain Coffee, Prime, OLIPOP, Waterboy — share a pattern: creator-led digital launch, documented TikTok velocity, Amazon review momentum, and retail buyer briefings that led with numbers, not stories.

The implication for F&B strategy is structural: **the product roadmap and the creator roadmap are now the same roadmap**. Brands planning launches in 2026 without a TikTok and creator-seeding plan are planning a longer, more expensive path to retail than their competitors.

### WHAT TO DO NOW

Audit your 2026 launch plan. If TikTok and Amazon review velocity are not named KPIs, the plan is already on the slow path.

# 02

## GLP-1 medications are restructuring every F&B category.

Mass adoption of GLP-1 medications — Ozempic, Wegovy, Mounjaro, Zepbound — is restructuring consumption patterns across the food and beverage industry. Declining volume in alcohol, sugary beverages, and indulgent snack categories. Rising volume in high-protein,

functional, and portion-controlled formats. The winning brands are not fighting the trend — they are **reformulating or repositioning to ride it**.

Functional beverages (OLIPOP, Poppi, Recess), high-protein snacks (Magic Spoon, Quest evolution, Chomps), non-alcoholic categories (Athletic Brewing, Ghia, Seedlip), and smaller-portion premium formats are outgrowing the broader F&B market. Legacy brands treating GLP-1 as a temporary headwind are conceding permanent share.

#### WHAT TO DO NOW

Map your product portfolio against GLP-1 consumption patterns. If you're in a declining category without a reformulation roadmap, that is the 2026 strategic priority.

# 03

## Retail buyers now lead with creator velocity data.

Category buyers at Whole Foods, Target, Sprouts, Walmart, and Costco have restructured how they evaluate emerging F&B brands. Before the pitch meeting, they pull TikTok velocity, hashtag volume, TikTok Shop GMV, and Amazon review count. A brand with \$500K in TikTok Shop revenue and 1,000+ Amazon reviews at a 4.4-star average is a materially different conversation than a brand with a slide deck and a founder story.

The effective F&B pitch in 2026 leads with these numbers, not with origin. The founder story matters — but **it matters after the velocity conversation, not before.**

### WHAT TO DO NOW

Build your monthly one-page velocity report for retail buyer meetings. Lead with TTS GMV, hashtag data, Amazon reviews, then founder story.

# 04

## Creator content has replaced in-store sampling as category education.

The traditional F&B category-education mechanism — in-store sampling programs — has been substantially displaced by creator demonstration content. A single TikTok clip showing a beverage poured, a snack tasted, or a supplement explained produces more trial conversion per dollar than most sampling programs, with full attribution and shareable media output.

For brands that built their category-entry playbook around sampling budgets, this is a strategic reallocation question: **how much of the sampling line item should now fund creator seeding?** In most cases, the answer is at least half.

#### WHAT TO DO NOW

Audit your sampling budget. Reallocate at least 40% to creator seeding and measure the attribution difference.

## 05

### FDA and FTC compliance is a 2026 creator-content operations problem.

FDA rules on structure-function claims and nutrient content claims apply to creator content as fully as to owned content. FTC Endorsement Guides require clear disclosure. At the scale of modern F&B creator programs — hundreds to thousands of creators per quarter — this is a compliance operations problem, not a legal review bottleneck.

The fix is an operating system: **pre-approved claim libraries for creators, forbidden-phrase lists, automated disclosure reminders, and monitoring software** that scans creator output for unapproved claims. Brands that design this workflow from the start run at cadence. Brands that don't run into bottlenecks that stop the program.

#### WHAT TO DO NOW

Document your approved claim library and forbidden-phrase list this week. If you do not have one, that is the compliance gap.

# 06

## AI-powered search is now the starting point for F&B purchase decisions.

Consumers researching a functional beverage, a protein bar, a non-alcoholic option, or a supplement increasingly ask ChatGPT, Perplexity, Claude, or Gemini to recommend options before clicking through to any retailer. The LLM answer is built from creator content, reviewer posts, Amazon reviews, and specialty publications — **not from brand-owned marketing.**

This is GEO for F&B. The brands winning in LLM answers are the ones producing consistent, specific creator content that references benefits, use cases, and ingredients. Generic brand copy does not show up. Specific creator content does.

### WHAT TO DO NOW

Query the four major LLMs for "best [your category] 2026" today. If you are absent, your creator and content roadmap is also your GEO roadmap.

### § 02 / CASE STUDIES

Three F&B patterns *every founder and CMO* should study.

# DTC → Retail

## Chamberlain Coffee: creator voice as category thesis

Emma Chamberlain built Chamberlain Coffee as a creator-led brand that translated YouTube-native voice into a retail-ready F&B business — expanding from DTC into Target, Whole Foods, Walmart, and other mainstream retailers while preserving the creator-authentic content voice that launched it. The brand did not bolt a creator onto a traditional CPG. It built a CPG around a creator. The distinction mattered to retail buyers, who evaluated the brand on the basis of proven consumer connection rather than a founder deck.

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### THE LESSON

Creator-founded brands that preserve creator voice through retail expansion hold brand equity that traditional CPG cannot replicate. Protecting the voice is as important as scaling the distribution.

# OLIPOP

## OLIPOP: building a category through consistent creator demonstration

OLIPOP built a prebiotic soda category parallel to Poppi through relentless creator seeding and transparent ingredient education — producing a catalog of demonstration content that doubled as category-defining consumer education. The brand moved from DTC-heavy launch into Whole Foods, Sprouts, Target, and Kroger distribution, achieving unit velocity that outperformed much of the traditional soda set in health-oriented grocery.

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### THE LESSON

In functional categories, creator content is how the category explains itself to consumers. Brands that own the demonstration layer own the category — whether or not they invented it.

NON-ALCOHOLIC / CATEGORY CREATION

# NA

## Athletic Brewing: building the non-alcoholic category through earned-media volume

Athletic Brewing built America's leading non-alcoholic craft beer brand by treating earned media and creator content as category-creation infrastructure — publishing relentlessly on non-alcoholic lifestyle, athletic performance, and sober-curious cultural shifts. As GLP-1 adoption, Gen Z drinking declines, and the broader sober-curious movement converged, Athletic owned the category conversation rather than fighting for share within an established one.

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### THE LESSON

When the category itself is being created, earned media and creator content are not marketing costs. They are the category. The brand that runs the category conversation owns disproportionate share of the category itself.

§ 03 / INTERACTIVE

Assess your digital-to-retail *readiness* in 2 minutes.

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Eight yes/no diagnostics separating F&B brands compressing the path to national retail from ones still running the 2018 playbook. Answer honestly.

Q.01

Can you state in one sentence the TikTok content format your product demonstrates on?

YES

NO

NOT SURE

Q.02

Do you seed at least 100 creators per month with documented food, beverage, or lifestyle posting history?

YES

NO

NOT SURE

Q.03

Do you have an FDA/FTC-compliant pre-approved claim library and forbidden-phrase list for creators?

YES

NO

NOT SURE

Q.04

Is Amazon Vine enrolled and a verified-buyer review outreach flow running from day one of launch?

YES

NO

NOT SURE

Q.05

Do you brief Whole Foods, Target, Sprouts, and Walmart buyers monthly with TikTok Shop GMV and Amazon review data?

YES

NO

NOT SURE

Q.06

Have you audited your product portfolio against GLP-1 consumption shifts and set a 2026 reformulation or repositioning plan?

YES

NO

NOT SURE

Q.07

Have you queried ChatGPT, Perplexity, Gemini, and Claude for "best [your category] 2026" in the last 90 days?

YES

NO

NOT SURE

Q.08

Do you track TTS GMV, retail velocity per door, and LLM share of voice — not just press impressions?

YES

NO

NOT SURE

The seven-step *90-day plan* to compress the digital-to-retail path.

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## 01

Choose the one TikTok format your product demonstrates on.

Pick the single visual hook: flavor reaction, routine integration, or ingredient reveal. Every creator brief references it. F&B brands that optimize for one format consistently outperform brands that try to run three at once.

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## 02

Build a 500-creator seeding pipeline.

Use creator discovery platforms to identify 500 micro creators (10K-250K) with documented food, beverage, or lifestyle history. Seed in batches of 100 per month. Volume creates probability of breakout — one viral clip pays for six months of the program.

## 03

### Install an FDA and FTC compliance operating system.

Pre-approved claim libraries. Forbidden-phrase lists covering unapproved health claims. First-line #ad or #sponsored disclosure required. Monitoring software to flag violations. Train legal once; run at cadence without review bottlenecks.

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## 04

### Engineer Amazon review velocity in parallel.

F&B on Amazon follows the same cold-start logic as consumer electronics: hit 100 reviews at 4.3-plus stars in the first 90 days and organic search visibility unlocks. Amazon Vine enrollment, verified-buyer outreach, subscription-basket retargeting — run all three from day one.

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## 05

### Brief retail buyers monthly with creator velocity data.

Build a one-page monthly report for Whole Foods, Target, Sprouts, and Walmart category buyers: TikTok Shop GMV trend, hashtag volume, Amazon review count and star trend, creator-to-purchase conversion data. Lead with the numbers; the founder story is supporting material, not the wedge.

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## 06

### Reposition for the GLP-1 category shift.

Audit your positioning against the GLP-1 consumption pattern. If you're in a declining volume category — alcohol, sugary beverages, indulgent snack — reformulation, portion-control, or messaging pivot is the 2026 strategic priority. If you're in a rising category — functional beverage, high-protein, non-alcoholic — lean harder into it.

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## 07

### Measure what actually moves the business.

Report: TikTok Shop GMV growth, attributable retail sell-through velocity in concentrated markets, cost per new customer through creator-sourced traffic, Amazon review growth rate, retail door count and velocity per door, LLM share of voice in your category. Tie each to the numbers the retail team and the CFO already track.

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§ 05 / FAQ

### Questions F&B *founders and CMOs* are asking in 2026.

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How has the path from F&B launch to national retail distribution changed in 2026?



What is the GLP-1 effect on food and beverage categories in 2026? +

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What TikTok content format actually drives F&B retail velocity? +

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How do retail buyers at Whole Foods, Target, and Walmart use TikTok data? +

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Does paid media still work for F&B launches, or has creator content replaced it? +

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How does a food and beverage brand stay compliant with FDA and FTC rules on creator content? +

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| WORK WITH US

Ready to compress your path *from launch to shelf?*

5W's Consumer Brands Practice builds and runs creator-led digital-to-retail programs for food, beverage, functional nutrition, and better-for-you brands — integrated with PR, retail media, creator operations, and GLP-1 category strategy. The 18-month path is a system, not a stroke of luck.

TALK TO THE CONSUMER BRANDS TEAM

EXPLORE 5W RESEARCH

CONTINUE READING ON THE 5W BLOG

SISTER PLAYBOOK

## The CPG Creator Seeding Playbook 2026

SISTER PLAYBOOK

## The Reviewer-First Launch Playbook for Consumer Electronics 2026

PRACTICE AREA

## 5W Food & Beverage Practice

SOURCES & FURTHER READING

- 01 eMarketer — TikTok Shop U.S. GMV surpassed \$15 billion in 2025.
- 02 ModernRetail — TikTok Shop food and beverage category more than doubled YoY in 2025.
- 03 TikTok — 2025 BFCM GMV surpassed \$500M in four days; US user engagement up ~50% YoY; livestream sales up 84% YoY.
- 04 Charm.io — U.S. TikTok Shop monthly GMV grew from \$15.1M (July 2023) to \$1.1B (July 2025).

- 05 JPMorgan, Morgan Stanley, Goldman Sachs — GLP-1 consumer impact research on F&B category volume, 2024–2025.
- 06 Beverage Industry, Food Business News — coverage of Poppi, OLIPOP, Athletic Brewing, Liquid Death, Chamberlain Coffee retail expansion.
- 07 IRI, NielsenIQ, Circana — F&B category velocity and retail sell-through data, 2024–2025.
- 08 U.S. Food and Drug Administration — structure-function and nutrient-content claims guidance.
- 09 FTC Endorsement Guides (updated 2023) — creator disclosure requirements.
- 10 5W — Consumer Brands Practice research and client engagements.

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