# The U.S. Weight Loss Market: 2014 Status Report And Forecast

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- Table: \$ value of weight loss products vs. services, 2013 growth rate
- Table: Total diet mkt. value, segments value: 2010-2013

### **Recent Competitor Developments**

- Summaries of new programs launched for 2014 diet season: Weight Watchers, Jenny Craig, NutriSystem, Medifast
- NutriSystem Fast Five Plan, June 2013 affiliation with 4,000 Walmart stores NS D Jump Start kit) description, prices
- Weight Watchers Simple Start 2-week plan description, prices
- Nestle sells Jenny Craig to North Castle partners in Nov. 2013 discussion, synergies with Curves fitness chain (also owned by North Castle)
- Closure of 100 Jenny Craig centers in No. America
- eDiets.com exits meal delivery business under new owner (As Seen On TV)

### **Dieter Demographics, Dieter Trends, New Fads**

- Discussion of total number of U.S. dieters, percent that are DIY dieters
- Research survey finds avg. number of diets a woman tries in her lifetime
- 91% of college age women trying to lose weight, new research

### 2014 Market Outlook & Effects of Obamacare

- Major diet market trends and developments, 2014 forecasts
- Table: 2013 & 204F dollar values of all diet market segment, 2014 growth rates
- Discussion of Obamacare's preventive health benefit, coverage of obesity screening
- and counseling sessions, terms & conditions, who qualifies, who can provide counseling, diet companies that have an advantage
- Obesity classified as a disease by the AMA, Doctors told to be more proactive in fighting obesity, opportunities for counseling revenues
- New competitors: CVS drugstore chain just launched DASH diet at its healthcare miniclinics, description of, costs, opportunity for diet companies to partner with other drugstore chains (Walgreens, Rite Aid, etc.).
- New diet book: Pastor Rick Warren Launches New Daniel Diet Plan.

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- Discussion of weight loss apps: why diet companies are overemphasizing their competitive threat and not looking internally at what's wrong with their own programs/services
- Descriptions of most popular fitness/weight loss apps: MyFitnessPal, LoseIt, Fooducate, Diet2Go, WeightBot, Noom, DietPoint
- Table: the major weight loss websites, year created, Alexa traffic ranks
- Online dieters profile: 8-year data (2005-2012) from BestDietForMe.com database (Marketdata website): online dieters % by: gender, age, diet budget, preferred location of diet program.
- List of the major weight loss websites and their owners.

# <u>Market Segment Status Reports & 2014 Outlooks</u>

## <u>Diet Soft Drinks Market</u>

- Discussion of consumer attitude shift away from diet sodas, avoidance of artificial sweeteners
- 2013 industry sales, % change from 2012, 2014 forecast

# Health Clubs Industry

- Discussion of 2013 performance, no. of health clubs, club members, member trends
- 2013 industry sales, % change from 2012, 2014 forecast

# Commercial Weight Loss Chains

- Analysis of reasons why revenues fell 4.5% in 2013, economy, bad weather, no new compelling programs in 2013 diet season, untapped niches not served, top management turnover, poor execution, flat is the new growth, not enough retail partners, price resistance
- Discussion of Jenny Craig sales by Nestle, combination with Curves, analyst estimates of current revenues
- Weight Watchers: resignation of CEO David Kirchoff, 9 mos. 2013 sales
- eDiets.com under new management, new strategy, new positioning
- NutriSystem's focus on profitability, cost control, making program more customized
- Table: 2013 vs. 2012 sales of the top 4 commercial chains
- 2013 industry sales, % change from 2012, 2014 forecast

# Diet Books Market, Exercise DVDs Market

- List of 2013 bestsellers, early 2014 bestsellers, descriptions of plans
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### <u>Medical Weight Loss Programs</u>

### - Summary: definition of this segment of the market, why so large

### Bariatricians

- Discussion of the profession's lack of visibility, no help from its trade group, opinions of market consultants, why an increase in weight loss surgeries not helping bariatricians' caseload.
- 2013 industry sales, % change from 2012, 2014 forecast

### Hospital & clinic-based programs, MD programs

- Discussion of differences between weight loss programs offered via: hospitals, medical clinic chains, and independent MDs
- 2013 performance of major medical chains: Lindora, Smart For Life, Centers for Medical Weight Loss, Medifast Clinics, Medi-Weightloss: % change in 2013 revenues, outlooks
- 2013 industry sales, % change from 2012, 2014 forecast.

### VLCD/LCD programs

- Discussion of status of very low calorie/low calorie medically monitored programs by vendors, used as turnkey programs by hospitals & clinics and MD practices, HMR outlook
- 2013 industry sales, % change from 2012, 2014 forecast

### Prescription obesity drugs market

- Analysis of minimal sales of 2013's new Rx drugs: Qsymia, Belviq reasons for poor sales, marketing partners, restrictions, moderate weight loss, costs, coverage by insurers, etc.
  Possible new market entrants in 2014; Contrave
- 2013 industry sales, % change from 2012, 2014 forecast

# Retail & Multi-level meal replacements, OTC diet pills

- Discussion of why meal replacements are outpacing OTC diet pills in growth, big success of MLM companies: Herbalife, Visalus
- Unilever thinking of selling Slim-Fast brand, estimated sales
- OTC diet pills, sales reported by Chain Drug Review
- FTC \$26 million fine against makers of Sensa appetitie suppressant, other companies, Marketdata commentary re model used by disreputable firms selling these supplements via retail, Internet, mail order.
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# **Reference Directory of Industry Sources**

Directory of trade associations, market consultants, special reports – name, address, phone, website, key contacts

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