

WEIGHT LOSS AND WEIGHT MANAGEMENT MARKET

[BY EQUIPMENT, {FITNESS EQUIPMENT (TREADMILL, STAIR STEPPERS)}, {SURGICAL EQUIPMENT (ADJUSTABLE GASTRIC BAND, GASTRIC BYPASS)}, DIET (WEIGHT LOSS MEALS, DIET SOFT DRINKS), WEIGHT LOSS SERVICES]

FORECAST TO 2019

Report Description

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1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

- To define, describe, and forecast the weight loss and weight management market on the basis of diets, equipment, services, and regions
- To provide detailed information regarding major factors influencing growth of the market (drivers, restraints, opportunities, and industry-specific challenges)
- To strategically analyze micromarkets¹ with respect to individual growth trends, future prospects, and contributions to the overall market
- To analyze opportunities in the market for stakeholders and provide details of the competitive landscape for market leaders
- To forecast the market size of market segments with respect to four main regions, namely, North America, Europe, Asia, and the Rest of the World (RoW)²
- To strategically profile the key players and comprehensively analyze their product portfolios, market positions, and core competencies³
- To track and analyze competitive developments such as joint ventures, mergers and acquisitions, new product developments, expansions, and research and development activities in the weight loss and weight management market

1. Micromarkets are defined as further segments and subsegments of the weight loss and weight management market included in the report

2. RoW includes Pacific countries, the Middle East, Africa, and Latin America

3. Core competencies of companies are captured in terms of their key developments, SWOT analyses, and key strategies adopted by them to sustain their positions in the market

1.2 MARKET DEFINITION

The fundamental cause of obesity and being overweight is an energy imbalance between the calories consumed and the calories expended. Changes in dietary and physical activity patterns are the results of the increasingly sedentary nature of work, changing modes of transportation, and increasing urbanization. This leads to raised body mass index (BMI) which is a major risk factor for noncommunicable diseases such as cardiovascular diseases, diabetes, musculoskeletal disorders, and cancer.

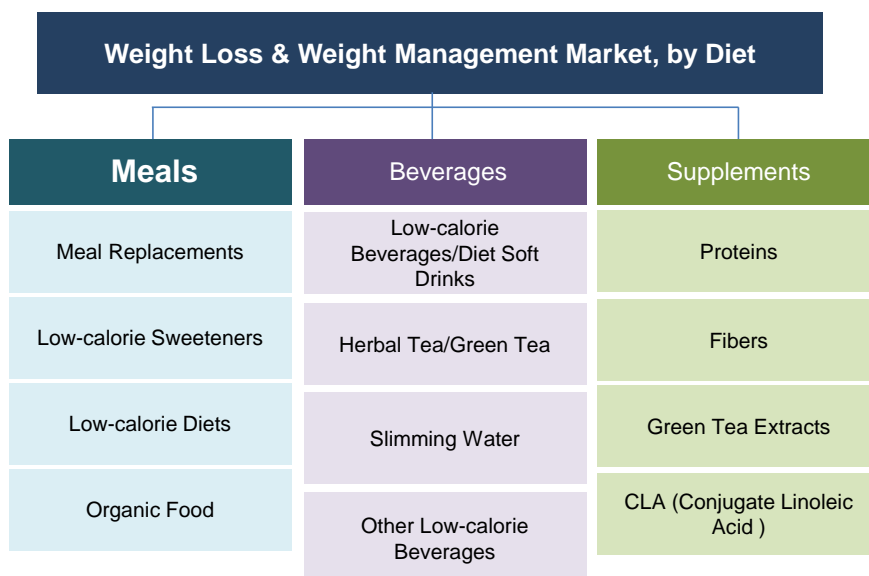
The weight loss and weight management market is a combination of three segments, namely, weight loss diets, (food, beverages, and supplements), weight loss services, and weight loss fitness and surgical equipment.

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

The research report categorizes the weight loss and weight management market into the following segments:

FIGURE 1 WEIGHT LOSS AND WEIGHT MANAGEMENT MARKET, BY DIET



Weight Loss and Weight Management Market, by Equipment

- Fitness Equipment
 - Cardiovascular Training Equipment
 - ◆ Treadmills
 - ◆ Ellipticals
 - ◆ Stationery Cycles
 - ◆ Rowing Machines
 - ◆ Stair Steppers

- ◆ Others
- Strength Training Equipment
 - ◆ Single Stations
 - ◆ Plate Loaded
 - ◆ Free Weights
 - ◆ Benches and Racks
 - ◆ Multistations
 - ◆ Accessories
- Body Composition Analyzers
- Fitness Monitoring Equipment
- Surgical Equipment
 - Minimally Invasive/Bariatric Surgical Equipment
 - ◆ Gastric Bypass
 - ◆ Laparoscopic Gastric Banding Systems
 - ◆ Laparoscopic Sleeve Gastrectomy
 - ◆ Biliopancreatic Diversion Surgeries
 - ◆ Revision Surgeries
 - Non-invasive Surgical Equipment
 - ◆ Intra-gastric Balloon System
 - ◆ EndoBarrier
 - ◆ Endoscopic Suturing
 - ◆ StomaphyX

Weight Loss and Weight Management Market, by Service

- Fitness Centers
- Slimming Centers
- Consulting Services
- Online Weight Loss Programs

Weight Loss and Weight Management Market, by Region

- North America
- Europe
- Asia
- Rest of the World (RoW)

1.3.2 YEARS CONSIDERED FOR THE STUDY

	PARTICULAR	SCOPE
1	Base Year	▪ 2013
2	Historical Year	▪ 2012
3	Forecast Period	▪ 2014–2019
4	Base Year Used for Company Profiles	▪ 2013

1.4 CURRENCY

The currency used in this report is USD, with market size indicated only in \$million.

- For companies reporting their revenue in USD, the revenues were picked from their annual reports
- For companies that reported their revenues in other currencies, the average annual currency conversion rate was used for the particularly year to convert the value to USD

1.5 LIMITATIONS

- The volume market is not included in the report due to limited information available from secondary as well as primary sources
- The report does not cover country-level quantitative information (value market), due to limited information available with primary and secondary sources

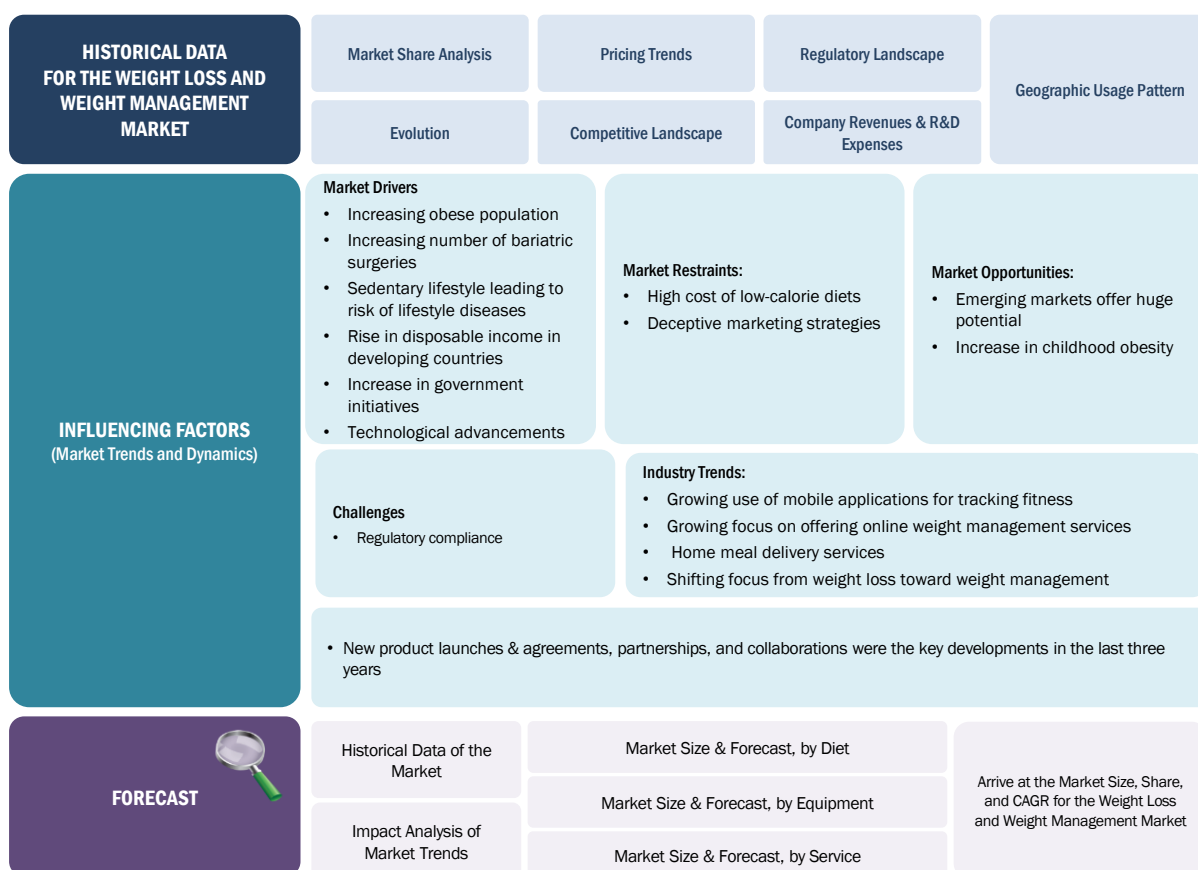
1.6 STAKEHOLDERS

- Manufacturers of high-calorie and low-calorie (diet) food and beverage
- Manufacturers of fitness equipment and accessories
- Manufacturers and suppliers of bariatric equipment
- Providers of online diet programs
- Venture capitalists
- Research and consulting firms

2 RESEARCH METHODOLOGY

This research study involved the usage of extensive secondary sources; directories; databases such as Hoovers, Bloomberg Businessweek, Factiva, and OneSource; white papers; annual reports; company house documents; and SEC filings of companies. Secondary research was mainly used to identify and collect information useful for the extensive, technical, market-oriented, and commercial study of the global weight loss and weight management market. It was also used to obtain key information about the major players, market classification, and segmentation according to the industry trends, regional markets, and developments related to the market and technology perspectives. Primary sources are mainly several industry experts from core and related industries; preferred suppliers, manufacturers, distributors, service providers, technology developers, researchers, and organizations related to all segments of this industry's value chain. In-depth interviews were conducted from various primary respondents which included key industry participants, subject-matter experts (SMEs), C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information as well as to assess future prospects. The following figure shows the market research methodology applied in making this report.

FIGURE 2 RESEARCH DESIGN



In the secondary research process, various secondary sources were referred to identify and collect useful information for the study. These sources include annual reports, press releases, investor presentations of companies, white papers, certified publications, articles from recognized authors, gold standard and silver standard websites, directories, and databases.

Secondary research was mainly used to obtain key information about the industry's value chain, leading and emerging players, market classification and segmentation according to the industry trends to the bottom-most level, geographical markets, and key developments from both market and technology-oriented perspectives.

In the primary research process, various primary sources from both the supply and demand sides were interviewed to obtain qualitative and quantitative information for this report. Primary sources from the supply side include industry experts such as CEOs, vice presidents, marketing directors, technology and innovation directors, and related key executives. Primary sources from the demand side include expert researchers from academic research institutes, bariatric surgeons, and noninvasive weight loss therapy physicians.

After the complete market engineering (which includes calculations for market statistics, market breakdown, market size estimation, market forecasting, and data triangulation), extensive primary research was conducted to gather information and to verify and validate the critical numbers arrived at. Primary research was also conducted to identify segmentation types; industry trends; Porter's analysis; PEST analysis; key players; competitive landscape of weight loss and weight management market players; and key market dynamics such as drivers, restraints, opportunities, burning issues, industry trends, and key player strategies.

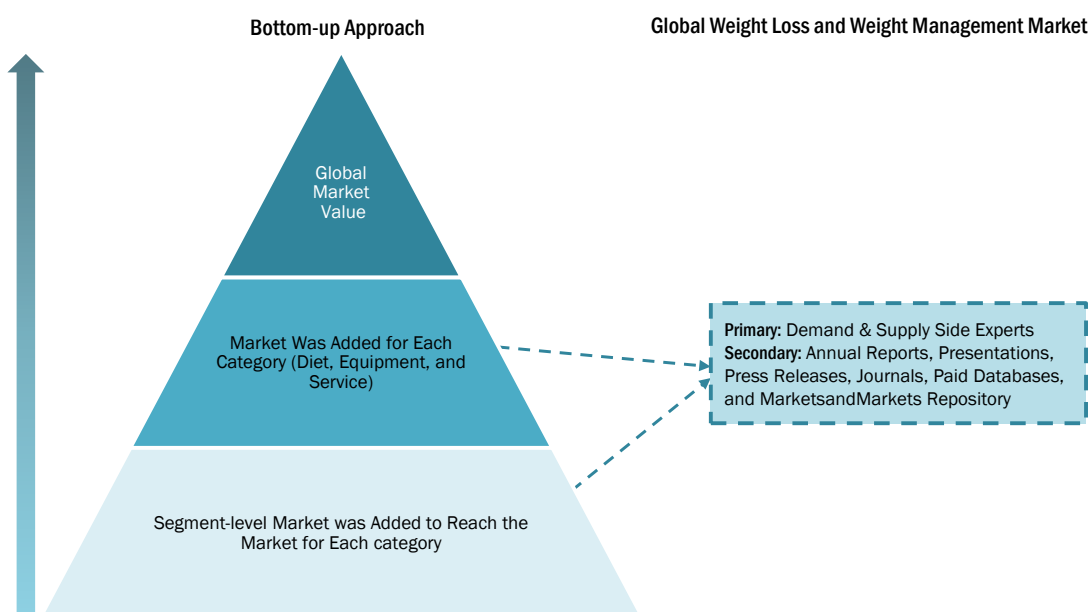
In the complete market engineering process, both top-down and bottom-up approaches were extensively used along with several data triangulation methods to perform market estimation and market forecasting for the overall market segments and subsegments listed in this report. Extensive qualitative and quantitative analysis was performed on the complete market engineering process to list key information/insights throughout the report.

2.1 MARKET SIZE ESTIMATION

Top-down and bottom-up approaches were used to estimate and validate sizes of the global market and various other dependent submarkets of the weight loss and weight management market. The research methodology used to estimate the market size includes the following details—the key players in the market were identified through secondary research, and their market contributions in the respective regions were determined through primary and secondary research. This entire procedure includes the study of the annual and financial reports of the top market players and extensive interviews for the key insights from industry leaders such as CEOs, VPs, directors, and marketing executives. All percentage shares, splits, and breakdowns were determined by secondary sources and verified through primary sources. All possible parameters affecting the markets covered in this research study have been accounted for, viewed in extensive detail, verified through primary research, and analyzed to reach the final quantitative and qualitative data. This data is consolidated and added with detailed inputs and analyses from MarketsandMarkets and presented in this report.

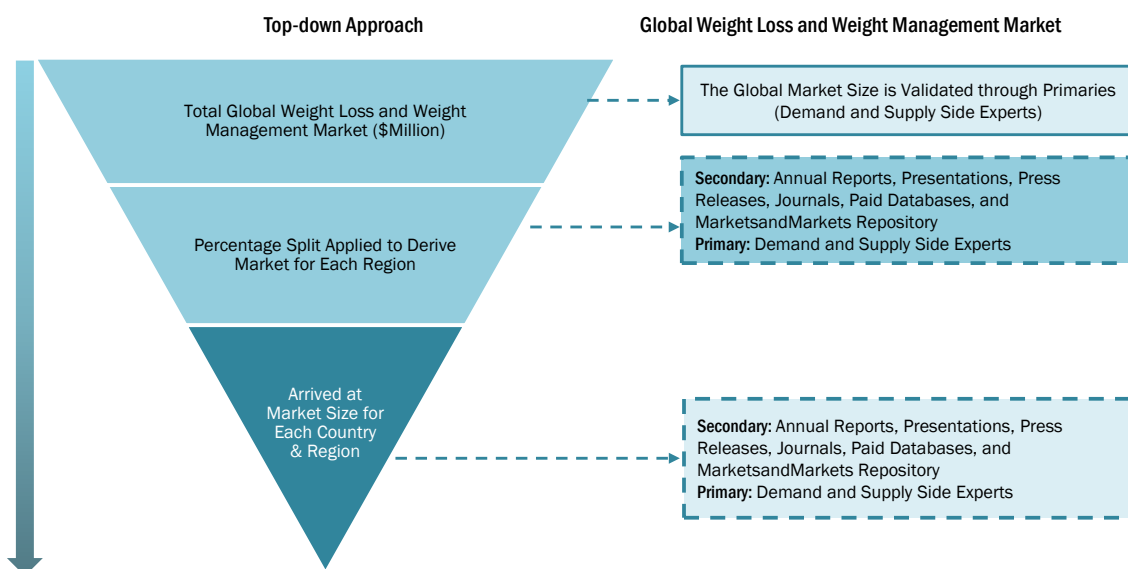
The following figure shows an illustrative representation of the overall market size estimation process employed for this study.

FIGURE 3 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH



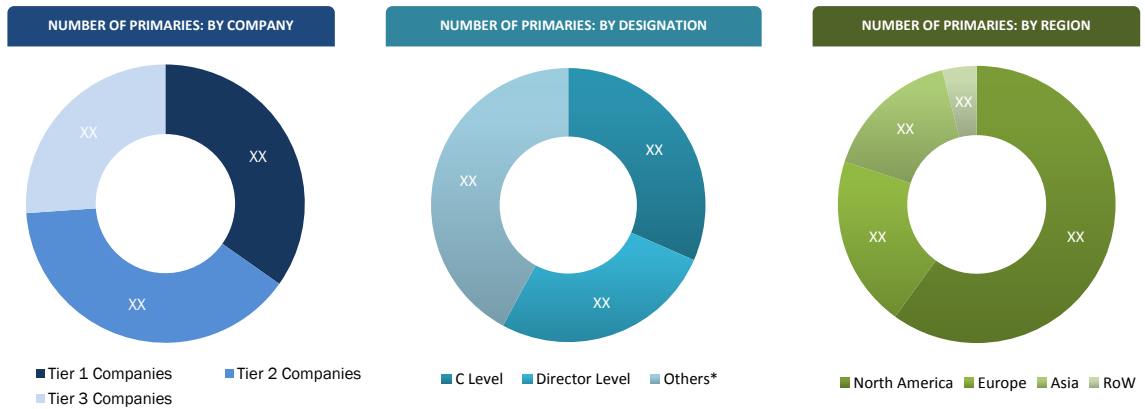
For estimating the size of the global weight loss and weight management market, the segmental market revenues were obtained from secondary sources through extensive primary interviews. The segment-level markets were then added up to reach the total market size of each category, namely, Diet, Equipment, and Service. By adding up the market of all these categories, the global weight loss and weight management market was derived. The total market derived through bottom-up approach was again validated through secondary sources and primary interviews.

FIGURE 4 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH



The overall market size derived by the bottom-up approach was used in the top-down procedure to estimate the size of each region, namely, North America, Europe, Asia, and Rest of the World (RoW), through the percentage splits obtained from secondary and primary research for each product segment.

FIGURE 5 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION



*Note: Others include sales managers, marketing managers, and product managers

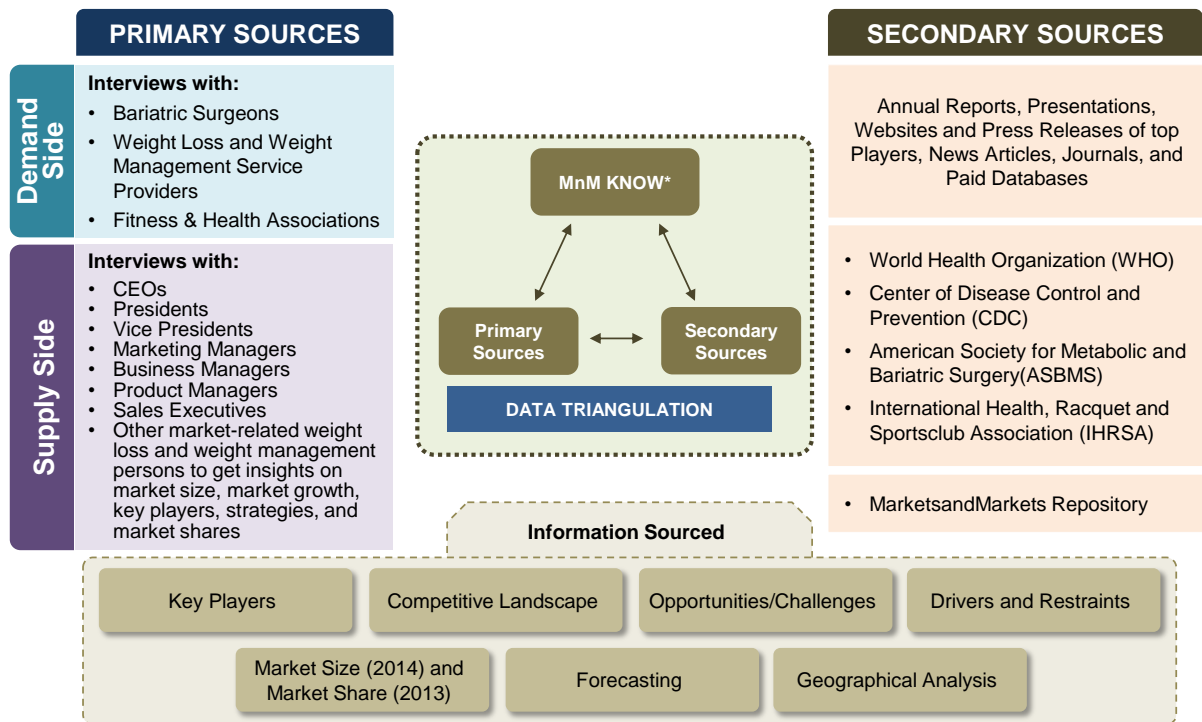
Tiers of the companies are defined on the basis of their total revenue. As of 2013: Tier 1 = >\$XX billion, Tier 2 = \$XX million to \$XX billion, and Tier 3 = <\$XX million

2.2 MARKET BREAKDOWN AND DATA TRIANGULATION

After arriving at the overall market size from the market size estimation process explained above, the total market was split into several segments and subsegments. In order to complete the overall market engineering process and to arrive at the exact statistics for all the segments and subsegments, data triangulation and market breakdown procedures were employed, wherever applicable. The data was triangulated by studying various factors and trends from both the demand and supply sides. Along with this, the market was validated using both top-down and bottom-up approaches.

The following figure shows the market breakdown structure and the data triangulation methodology implemented in the market engineering process for making this report.

FIGURE 6 DATA TRIANGULATION METHODOLOGY



MnM KNOW* stands for MarketsandMarkets' 'Knowledge Asset Management' framework. In this context, it stands for existing market research knowledge repository of over 5000 granular markets, our flagship competitive intelligence and market research platform "RT", subject matter experts, and independent consultants. MnM KNOW acts as an independent source that helps us validate information gathered from primary and secondary sources .

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2.3 KEY DATA FROM SECONDARY SOURCES

PARAMETER	SECONDARY SOURCES
1 Market Size	<ul style="list-style-type: none"> Company Financials Magazines Journals Press Releases Paid Databases MarketsandMarkets Data Repository
2 Revenue of Companies	<ul style="list-style-type: none"> Annual Reports Company Websites Public Databases MarketsandMarkets Data Repository
3 Qualitative Information (Market Dynamics and Trends)	<ul style="list-style-type: none"> Company Websites Annual Reports Press Releases MarketsandMarkets Data Repository

2.4 KEY DATA FROM PRIMARY SOURCES

	PARAMETER	DATA
1	Geographic Split <ul style="list-style-type: none"> Overall market and subsegments in 2014 CAGR of each region in the forecast period (2014–2019) 	<ul style="list-style-type: none"> Global weight loss and weight management market, by region – North America, Europe, Asia, and RoW
2	Global Market Size <ul style="list-style-type: none"> The global market size for 2014 CAGR for the forecast period (2014–2019) 	<ul style="list-style-type: none"> Global weight loss and weight management market Global weight loss and weight management market by diet, equipment, and service
3	Market Split <ul style="list-style-type: none"> Meal replacements, low-calorie sweeteners, low-calorie diets, organic food, low-calorie beverages/ diet soft drinks, herbal tea/ green tea, slimming water, protein, fiber, green tea extract, and CLA Surgical equipment and fitness equipment Fitness centers, slimming centers, online weight loss programs, and consulting services 	<ul style="list-style-type: none"> Global weight loss and weight management market, by diet Global weight loss and weight management, by equipment Global weight loss and weight management, by service

2.5 KEY INDUSTRY INSIGHTS

“The CAGR for the weight loss and weight management services market over the next five years is expected to be XX%-XX%.”

– Sales Manager, Leading Weight Loss Service Provider

“Emerging economies such as Singapore, China, and India offer an array of growth opportunities for the weight loss and weight management market in the next five years.”

– Consultant



“In 2014, North America accounted for the major market share. However, in the coming five years, Asia is poised to grow at the highest CAGR of XX%.”

– Vice President, Leading Weight Loss Diet Manufacturing Company

“Cardiovascular training equipment accounts for the major market share in 2014, accounting for almost XX%-XX% of the total fitness equipment market. The high share of the market is attributed to the increase in the number of health clubs and memberships across the globe.”

– Vice President- Global Marketing, Leading Fitness Equipment Manufacturer

“Dietary supplements is the most premium category for players in the weight loss diet market. These supplements enrich food with specific nutritional benefits, thus enhancing its market value in the minds of the customers.”

– Manager R&D, Leading Weight Loss Supplements Provider

2.6 ASSUMPTIONS FOR THE STUDY

PARAMETER	ASSUMPTIONS
<p data-bbox="316 524 683 591">Global Weight Loss and Weight Management Market</p>	<ul data-bbox="815 371 1422 734" style="list-style-type: none"><li data-bbox="815 371 1422 450">• Low-calorie ready meals are assumed to be a part of meal replacements<li data-bbox="815 465 1422 544">• Home meal delivery services are assumed to be under online weight loss programs<li data-bbox="815 560 1422 638">• There will be no abrupt macroeconomic changes across the globe during the forecast period<li data-bbox="815 654 1422 732">• The exchange rate is assumed to be same as that of 2013 for the forecast period

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SAMPLE TABLES

TABLE 1 WEIGHT LOSS AND WEIGHT MANAGEMENT MARKET SIZE FOR LOW CALORIE SWEETENERS, BY REGION, 2012–2019 (\$MILLION)

Region	2012	2013	2014-e	2019-p	CAGR% (2014–2019)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e -Estimated, p-Projected

Source: Annual Reports, SEC Filings, Investor Presentations, Press Releases, American Society of Nutrition (ASN), Nutrition Business Journal, The American Beverage Association (ABA), Union of European Soft Drinks Associations (UNESDA), The Tea Association of USA, World Health Organization (WHO), Center for Disease Control and Prevention (CDC), International Diabetes Federation (IDF), Expert Interviews and MarketsandMarkets Analysis

North America accounted for the largest share of ~XX% of the weight loss and weight management market for low calorie sweeteners in 2014. This geographic segment is poised to reach \$XX million by 2019 from \$XX million in 2014, at a CAGR of XX% from 2014 to 2019.

TABLE 2 WEIGHT LOSS AND WEIGHT MANAGEMENT MARKET SIZE FOR ORGANIC FOOD, BY REGION, 2012–2019 (\$MILLION)

Region	2012	2013	2014-e	2019-p	CAGR% (2014–2019)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e -Estimated, p-Projected

Source: Annual Reports, SEC Filings, Investor Presentations, Press Releases, American Society of Nutrition (ASN), Nutrition Business Journal, The American Beverage Association (ABA), Union of European Soft Drinks Associations (UNESDA), The Tea Association of USA, World Health Organization (WHO), Center for Disease Control and Prevention (CDC), International Diabetes Federation (IDF), Expert Interviews and MarketsandMarkets Analysis

North America accounted for the largest share of ~XX% of the weight loss and weight management market for organic food in 2014. This geographic segment is poised to reach \$XX million by 2019 from \$XX million in 2014, at a CAGR of XX% from 2014 to 2019.

TABLE 3 WEIGHT LOSS AND WEIGHT MANAGEMENT MARKET SIZE FOR HERBAL TEA & GREEN TEA, BY REGION, 2012–2019 (\$MILLION)

Region	2012	2013	2014-e	2019-p	CAGR% (2014–2019)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e -Estimated, p-Projected

Source: Annual Reports, SEC Filings, Investor Presentations, Press Releases, American Society of Nutrition (ASN), Nutrition Business Journal, The American Beverage Association (ABA), Union of European Soft Drinks Associations (UNESDA), The Tea Association of USA, World Health Organization (WHO), Center for Disease Control and Prevention (CDC), International Diabetes Federation (IDF), Expert Interviews and MarketsandMarkets Analysis

North America accounted for the largest share of ~XX% of the weight loss and weight management market for herbal tea and green tea, in 2014. This segment is poised to reach \$XX million by 2019 from \$XX million in 2014, at a CAGR of XX% from 2014 to 2019.

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