

Status of The U.S. Weight Loss Market: Effects of The Pandemic

A Market Research Analysis

- June 2020 -

Table of Contents

	Page
<u>Introduction, Scope, Methodology</u>	1
<u>Overview: Weight Loss Market Size & Market Segments</u>	6
- Discussion of Marketdata's 2020 market forecasts for each segment of the weight loss market	
<u>Table:</u>	
- Total weight loss market \$ sales, 10 segments: 2012-2020	
<u>Effects of Covid-19 on Consumer Dieting Behavior</u>	9
- Changes in: exercising at home, usage of more virtual dieting apps/services, increased consumption of frozen convenience foods, visits to hospitals, clinics, MDs, shift of the diet "season" to later in 2020.	
<u>Commercial Weight Loss Programs</u>	12
- Recap of full-year 2019 sales/performance for the major firms (WW, NutriSystem, Jenny Craig, Medifast, Profile by Sanford) and total market segment	
- Likely winners/losers post pandemic in 2020	
- Effects of the pandemic: discussion	
- Marketdata 2020 growth/revenue forecast	
<u>Tables:</u>	
- Revenues of the 7 leading commercial chains: 2015-2020 F	
<u>Company Outlooks, 2019 performance & developments, 2020 Revenue Forecasts:</u>	
* WW International	
* Jenny Craig	
* NutriSystem	
* Medifast	
* Noom	

- 2019 Status Report of the market: estd. channel sales (diet pills, meal replace.), findings of Nutrition Business Journal (NBJ) research, top meal replacements brands
- Analysis of the meal replacements market: why sales will hold up, mass appeal, MLM Channels popular, price, accessibility
- Analysis of the OTC appetite suppressants market
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Tables:

- Estimates of OTC diet pills, meal replacements, combined sales - 1981-2020 F
- U.S. Retail & MLM sales of meal replacements, by brand: 2012-2020 F

Company Outlooks & 2020 Sales Forecasts:

- **Slim-Fast (Glanbia plc)**
- **Herbalife**
- **Simply Good Foods (incl. Atkins)**

Medical Weight Loss Programs

Hospital & Clinic Chains, MD programs p. 33

- 2020 Status Report & Summary for all medical programs, mix of type of medical weight Loss programs
- Interviews with management at HMR Boston, Robard, Let's Lose, consultants

Table:

- Type of medical programs, market structure & mix: \$ value 2012-2020

- Physician-based diet programs:
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

VLCD/LCD Modified Fasting Programs

- Status report (HMR Boston, Robard)
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

The Weight Loss (bariatric) Surgery Market p. 40

- Analysis – 2018 & 2019 no. of surgeries, 2020 forecasts, costs per surgery
- Discussion of likely effects of hospitals not accepting elective surgeries during pandemic
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Tables:

- No. of bariatric surgeries performed: 1992-2020
- \$ value of the market: 1992-2020 F
- \$ value of the market, by type surgery

- 2020 Status Report: Contrave, Qsymia & Belviq sales, Belviq taken off market
- New obesity drugs and those in development: Saxenda
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

The Diet Soft Drinks & Artificial Sweeteners Market

49

The Diet Soft Drinks Market

- Status Report, 2019 performance, diet soft drinks as % total soft drinks, mkt. nature and historical growth, why the market rebounded, diet's share of all carbonated soft drinks, outlook by Beverage Industry, Beverage Digest
- Total soft drink retail \$ sales, diet share of gallons/retail sales: 1989-2020 forecast
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Table:

- 1989-2020 F diet soft drink \$ sales

The Artificial Sweeteners Market

- Market closely related to diet soft drink consumption
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Table:

- 1989-2020 F artificial sweetener \$ sales

Frozen Diet Dinner Entrees Market

54

Low-cal Frozen Diet Entrees & Low-cal Foods Market

- 2019 Mkt. Status Report, definition of "diet" foods, discussion of dinner entrees, the major brands, reasons for 2019 turnaround in sales (innovation, packaging)
- Actions taken by producers to revitalize sales, packaging, new formulations, etc.
- Marketdata's mkt. size estimates for 1994 to 2020 F
- Sales estim. For 2018 \$ volume for Lean Cuisine, Smart Ones, Healthy Choice
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Health Clubs Industry

58

- Status Report of U.S. Health Clubs Industry - no. of facilities, type clubs, number of club members, recent trends, Industry receipts: 1993-2020 estd. share of clubs with diet programs. (IHRSA), actions of major chains
- **Effects of the pandemic: discussion**
- **Marketdata 2020 growth/revenue forecast**

Reference Directory of Industry Sources

61