

# **The U.S. Weight Loss Market: A Statistical Profile**

## **Data Pack**

**- November 2022 -**

### **Table of Contents**

	<b>Page</b>
<b><u>Introduction – Study scope and methodology</u></b>	1-3
<b><u>Weight Loss Market Size &amp; Market Segments</u></b>	4-12
- Summary: discussion of the total U.S. weight loss market size: 2022 estimates/forecasts/outlook for each of the major market segments (commercial programs, medical programs, meal replacements, health clubs, diet dinner entrees, diet soft drinks, artificial sweeteners, etc.)	
- Performance of the leading weight loss companies: 2020-2022 sales	
<u>Tables:</u>	
<ul style="list-style-type: none"><li>• Historical market revenues \$ size, by segment: 1989-1996</li><li>• Historical market revenues \$ size, by segment: 1997-2001</li><li>• Historical market revenues \$ size, by segment: 2006-2010</li><li>• Historical market revenues \$ size, by segment: 2016-2022 F</li><li>• Market segment forecasted growth rates: 2021-2025</li><li>• List of the top weight loss companies, by 2020 sales</li></ul>	
<b><u>Demographics: Profile of The American Dieter</u></b>	13-22
- Scope of the American obesity epidemic, number/percent obese or overweight, latest CDC data, obesity rates by state,	
- Discussion: how many Americans diet, how often, why diets fail, methods used	
- Typical dieter profile, by age, sex, income – Percent of DIY dieters	
- Number of dieters by method used, no. of dieters by type plan	
- Covid-19 pandemic shifts the “diet season”, affects how consumers exercise and What they eat (more frozen foods)	
- More use of virtual dieting	
- Dieter Surveys/profiles by: Calorie Control Council top dieting methods used, low-cal food/beverage usage by kind, diet attempts	

## Tables:

- State/regional obesity statistics, by state: % of population
- Number of American dieters: 1996-2021 estimates
- Percent of dieters by sex
- Dieters by sex, age, income
- Dieters by type weight loss program used

## **Profile of The Health Clubs Industry**

23-24

- Status Report of U.S. Health Clubs Industry - no. of U.S. facilities, type clubs, number of club members, devastating effects of the pandemic/no. of clubs closed
- 2020-2021 industry revenues, 2022 Forecast

### Table:

- Revenues of U.S. health clubs industry: 1993-2025F

## **Profile of Commercial Weight Loss Programs**

25-52

Summary: Revenues of commercial diet chains segment compared to the total market

- 2021 market segment performance
- 2022 segment forecasts
- Major metrics/operating ratios for commercial weight loss centers derived from Census, Franchise Disclosure Documents, public companies, other sources.

### Industry Structure & Key Ratios

Summary: discussion & analysis of operations and metrics in 2017 vs. 2012, for: Legal form of companies, single/multi-unit firms, by revenues size of establishments Top 50 firms market share, etc.

Census Bureau Operating Ratios: 2017, 2012, 2007, 2002 (Commercial diet centers/services) (no. of estabs., firms, receipts, receipts per estab., payroll as % sales, etc.)

### Census Tables

- \* Industry snapshot: no. of estabs., receipts, avg. per estab. & employee, payroll as % sales, etc. – 1997, 2002, 2007, 2012, 2017
- \* Employee sales/payroll productivity – 2002, 2007, 2012, 2017
- \* Establishments, by legal form (corporations, partnerships, sole proprietors) – 2012, 2017
- \* Market share for largest 4, 8, 20, 50 firms - 2012, 2017

- \* Ratios, by single vs. multi-unit firms - 2012, 2017
- \* Ratios, by receipts size of firms & establishments - 2012, 2017
- \* No. of diet centers, by state & region, avg. receipts per estab. By state
- \* 2018 no. of estabs. payroll, estd. receipts, by state, ranked (County Business Patterns)

#### Other Tables:

- \* No. of U.S. weight control services (1991-2019)
- \* Number of commercial centers ( 2010, 2012, 2014, 2016, 2018, 2020 - top chains)
- \* Revenues of top commercial chains: 2016-2025 F
- \* No. of center locations, by company: 2010-2020
- \* Revenues of the leading commercial chains: 2003-2022
- \* Sample Income Statement of a typical commercial weight loss center

### **Profile of Medical Weight Loss Programs**

53-63

- Summary: Mix of different types of medical weight loss programs, \$ size of each
- Status Report: Effects of the pandemic on medical program operations and revenues: The pivot to digital delivery

#### Tables

- Value of The U.S. Medical Weight Loss Market, by segment: 2015-2021

### **Hospital, Clinic, MD-based Programs (includes franchises, regional chains)**

- 2020-2021 performance during the pandemic
- 2022 outlook and forecast

### **Bariatrician (Obesity Medicine Specialists) Programs**

- 2020-2021 performance during the pandemic
- 2022 outlook and forecast

### **The Bariatric Surgery Market**

- 2020-2021 performance during the pandemic
- 2022 outlook and forecast

### Tables:

- Number of bariatric surgeries performed in the U.S. – 1995-2022 F
- Estimated \$ value of the market – 1995-2022 F
- Bariatric surgeries performed, by type: 2013-2019

### **The Prescription Diet Drugs Market**

- Status Report: Discussion of the dominant position of Novo Nordisk with Saxenda and Wegovy
- New obesity drugs in development to 2026: semaglutide
- 2020-2021 market performance during the pandemic
- 2022 outlook and forecast

### Tables:

- Obesity drug sales in the U.S. – 2004-2021 estimates

### **Profile of The Meal Replacements & Retail Diet Pills Market**

64-67

- Summary: Usage of meal replacements by dieters, why so popular
- 2021 Status Report of the market: why sales were strong during the pandemic, estd. channel sales (OTC diet pills, meal replacements), findings of Nutrition Business Journal (NBJ), Chain Drug Review research
- 2022 Forecasts (OTC diet pills, meal replacements)
- Why growth outlook is strong for meal replacements, preferred by MDs, MLMs, commercial chains, why retail diet pills mkt. still struggles
- NBJ estimates of diet pill & meal replacements \$ and % sales, by distribution channels, discussion of multilevel firms (Advocare, Shaklee, Herbalife, Quixtar, Nu-Skin)

### Tables:

- \* U.S. Retail & MLM Sales of Meal Replacements, by top brands -
- \* Marketdata estimates of retail diet pills, meal replacements, combined sales - 1981-2025 F
- Top MLM companies' sales of meal replacements: 2020.

The Diet Soft Drinks Market

- Status Report 2020-2021, why sales have improved lately, effect of the pandemic on consumption
- Analysis of diet soft drinks as % total soft drinks, mkt. nature and historical growth, forecasts, demographics of consumers, diet's share of all carbonated soft drinks (Beverage Industry, Beverage Digest),
- Total soft drink retail \$ sales, diet share of gallons/retail sales: 1989-2020, 2021-2025 forecast
- Demographics of diet soft drink consumers, historical nature of the market.

Table:

- \* 2000-2025 F diet soft drink \$ sales

The Artificial Sweeteners Market

- Status Report of the mkt. – 2020-2022 forecast
- Sweeteners by end use (% used for soft drinks vs. tabletop sweeteners mkt.)

Table:

- \* 1989-2025 F artificial sweeteners \$ sales

**Profile of The Diet Dinner Entrees Market**

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

- Mkt. Status Report: 2021-2022 - definition of "diet" foods, discussion of dinner entrees, the major brands, Consumers shift to frozen foods during the pandemic, actions by food industry to spur sales

Table:

- Major brands sales: 2017-2021 (Weight Watchers, Lean Cuisine, Healthy Choice, low carb, Wal-Mart)
- Marketdata mkt. size estimates for 1994 to 2025 F

**Reference Directory of Industry Information Sources**

