

The U.S. Weight Loss and Diet Control Market

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Table of Contents

	Page
<u>Introduction, Scope, Methodology</u>	1-4
<u>Executive Overview</u>	5-40
- Market definition and segments	
- Status of the market: effects of the pandemic, recovery	
- Discussion of diet market's major developments since 2021: shift to virtual services, medical MD/clinic programs gain strength with new Rx obesity drugs	
- Outlook for 2023 diet season, discussion of rise of MLM firms, DIY trends, company programs, competition from apps,	
- Ranking of the top weight loss companies, by 2022 revenues	
- Summary of major market and company developments of 2020-2023	
- \$ size of market and its 12 segments, forecasted 2021-2025 growth rates for segments	
- Market Segment Status Reports & Outlooks for 2020-2022, 2027 F: commercial chains, diet soft drinks & artificial sweeteners, low-cal foods, meal replacements & appetite suppressants mkt., medical weight loss programs (hospitals & clinics, bariatric surgery, Rx diet drugs, VLCDs).	

Tables:

- Historical market revenues \$ size, by segment: 1996-2022
- List of the top weight loss companies, by 2022 sales
- Revenues of top commercial chains: 2016-2027 F
- Diet soft drink sales: 1989-2027 F
- Revenues of health clubs industry: 1993-2027 F
- No. of bariatric surgeries in the U.S. – 1992-2027 F
- Value of meal replacements and OTC diet pills sales: 2005-2027 F

Highlights of ALL study chapters contained in the Overview

Dieter Demographics **41-62**

- Scope of the American obesity epidemic, number/percent obese or overweight, latest CDC data, obesity rates by state, recent dieter trends (shift to do-it-yourself methods during last recession), ranking of top diet programs by U.S. News & World Report - 2023
- Discussion: how many Americans diet, how often, why diets fail, methods used
- Dieter actions don't match intentions: survey results
- To healthy eating trends – predictions, top 10 diet types used by consumers
- Typical dieter profile, by age, sex, income – number of diet attempts per year
- Number of dieters by method used, no. of dieters by type plan
- Analysis of current & historical dieting trends, 12-year shifts in dieting methods
- Definition and no. of Millennials, why important cohort of future dieters

Findings of Dieter Surveys/profiles by:

- Calorie Control Council, no. of U.S. dieters & low-cal food/beverage users, top dieting methods used, low-cal food/beverage usage by kind, diet attempts

Table: State/regional obesity statistics: % of population: 2021

The Health Clubs Industry

63-86

- Status Report of the Health Clubs Industry – effects of pandemic and recovery since 2020, smaller no. of facilities, type clubs, number of club members, recent trends, Industry receipts: 1993-2027 F, characteristics of club members, drop-out rates, members by type club, estd. share of clubs with diet programs. (IHRSA)
- ASCM's top fitness trends for 2023
- 15 top participant sports -(NSGA), % chg. In participation
- Most popular women's sports: types of exercise equipment, home exercise trends
- How women keep fit, most popular types of exercise equip. used, general trends in exercise, home exercise and gyms.
- Health clubs' involvement with weight loss, % with programs, using clubs as weight loss method, samples/costs of typical diet programs offered by health clubs
- Reasons why health clubs' weight loss programs fail, programs vary greatly in price & content–consultants' analysis, private label wt. loss programs

Commercial Weight Loss Chains

87-191

- Status Report: Effects of the pandemic, recovery since 2020, which commercial chains fared well, casualties, shift to more virtual services, more competition from medical programs sales models used by Medifast, NutriSystem,
- Outlook for 2023 diet "season"
- Discussion of all major developments since 2020 (lower no. of centers, avg. cost of major commercial plans vs. medical and self-help plans 2019-2022 segment performance, 2023 outlook, estd/actual revenues of leaders
- In-depth discussion of leaders' strategies, move to wellness, Weight Watchers struggles, success of Medifast, sale of Profile by Sanford franchise, why competing medical programs factors affecting 2023 diet season, program customization, latest hot diets
- Positive/negative factors affecting growth from 2019-2027.
- **Franchising**: why it's more difficult, use as growth strategy, investment costs, profiles of Wt. Watchers, Jenny Craig franchises, why franchising may be less viable today.
- Discussion of the weight loss/fitness apps market, growth of Noom

Tables:

- Avg. cost of popular diet programs
- No. of center locations, by company: 2010-2022
- Revenues of the leading commercial chains: 2003-2022
- Historical table of segment revenues/growth from 1989-2027 F
- Census Bureau snapshot of the industry: 2007, 2012, 2017, 2020 key ratios, stats
- Sample Income Statement of a typical commercial weight loss center

Industry Structure & Key Ratios

- 2017, 2012, 2007 - industry snapshots for commercial diet centers: no. of establishments, legal form of firms, top 50 firms mkt. share, ratios by firm's receipts, top states
- Sample income statement for a typical commercial center: (expenses by type, profits)
- Avg. revenues per co.-owned/franchised center for Jenny Craig & LA Weight Loss
- Avg. costs to acquire new customers
- What commercial centers have in common, expansion of 1980s/contraction of 1990s 1982-88 diet franchise avg. revenues per unit, no. of centers/sites operated by top chains.

Census Bureau Operating Ratios: 2020, 2017, 2012, 2007 (Commercial diet centers/services) (no. of estab., firms, receipts, receipts per estab., payroll as % sales, etc.)

Tables

- Industry snapshot: no. of estab., receipts, avg. per estab. & employee, payroll as % sales, etc.
- Employee sales/payroll productivity
- Establishments, by legal form (corporations, partnerships, sole proprietors)
- Market share for largest 4, 8, 20, 50 firms
- Ratios, by single vs. multi-unit firms
- Ratios, by receipts size of firms & establishments
- No. of diet centers, by state & region, avg. receipts per estab. By state
- 2020 no. of estab. payroll, estd. receipts, by state, ranked (County Business Patterns)

Other Tables:

- No. of U.S. weight control services (1991-2023)
- Number of commercial centers (2010, 2012, 2014, 2016, 2018, 2020, 2022 - top chains)

Company profiles: in-depth company history, current status, how programs work, costs, franchise systems, 2019-2020 revenues, new programs, strategies, address/website):

- * **Weight Watchers International** p. 135
- * **Jenny Craig** 148
- * **NutriSystem** 160
- * **Medifast** 174
- * **Metabolic Research Centers** 179
- * **Profile by Sanford** 183
- * **Slimgenics** 187
- * **Beachbody** 189

The Diet Soft Drinks & Artificial Sweeteners & Diet Food Markets

192-224

The Diet Soft Drinks Market

- Status Report: why sales have improved lately, effect of the pandemic on consumption
- 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, 2021-2027 forecast
- 1989-2027 F diet soft drink \$ sales
- Table: Demographics of diet soft drink consumers, historical nature of the market.

The Artificial Sweeteners Market

- Status Report of the mkt., new high intensity sweeteners emerging, Stevia, Sucralose, Splenda, consumer trend to avoid artificial ingredients, data from Calorie Control Council regarding use by consumers
- Sweeteners by end use (% for soft drinks vs. **tabletop sweeteners** mkt.)
- Description of major types (Aspartame, Neotame, Saccharin, Sucralose, Stevia, Acesulfame)
- Market size & growth, historical sales 1991-2022 performance, 2027 forecasts.

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

- Mkt. Status Report, 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
- Actions taken by producers to revitalize sales, packaging, new formulations, etc.
- Marketdata mkt. size estimates for 1994 to 2027 F
- Outlook and sales estim. for 2022, \$ volume for Lean Cuisine, Smart Ones, Healthy Choice
- Low-carb foods - mkt. size estimates.
- Company Profile: **Atkins Nutritionals**

Retail Meal Replacements & Appetite Suppressants Market

225-277

- Definition/nature of meal replacements vs. over-the-counter (retail) diet supplements, ingredients being used today, new herbal products: coffee bean extract, HCG drops
- History/nature of mkt.- cyclical shifts from mid-1980s
- **User demographics:** no. and % of dieters using diet pills and meal replacements
- 2022 Status Report of the market: why MLM sales were weak during the pandemic, estd. channel sales (diet pills, meal replace.), findings of Nutrition Business Journal (NBJ), Chain Drug Review research, top meal replacements brands sales
- Why long-term outlook is strong for meal replacements, preferred by MDs, MLMs, commercial chains, why retail diet pills mkt. still struggles, possible FTC and state bills, actions
- Marketdata discussion of traditional/nontraditional distribution channels
- **Mkt. size/growth:** true size of the mkt. - why estimates differ widely
- NBJ estimates of diet pill & meal replacements \$ and % sales, by distribution channels, discussion of multilevel firms (Advocare, Shaklee, Herbalife, Quixtar, Nu-Skin)
- Marketdata estimates of growth for diet pills & meal replacements 2021-2027 F, demand factors.

Tables:

- Marketdata estimates of retail diet pills, meal replacements, combined sales - 1981-2027 F
- Discussion of 2020-2022 market performance, 2023 outlook, 2027 forecasts
- Top retail diet pill brand sales, 2011-2015
- Top MLM & retail companies' sales of meal replacements: 2020 & 2022.

Company profiles: **Slim-Fast (Glanbia), Herbalife, Visalus Life Sciences , Isagenix, Shaklee, Advocare, AMWAY (Quixtar), Nu-Skin, USANA Health Sciences** (estd. revenues, strategies, product lines, marketing)

The Weight Loss Apps Market

278-283

- Discussion/analysis of weight loss apps market, major competitors, mkt. size
- Company Profile: **Noom**

Medically-Supervised Weight Loss Programs

284-402

Hospital & Clinic Chains Weight Loss Programs

284-328

- Structure of the medical weight loss market, mix and \$ value by: hospitals ^ private MD programs, clinic chains & franchises, Rx diet drugs, bariatric surgery, VLCDs
- **Status Report:** Effects of the pandemic on medical program operations and revenues: The pivot to digital delivery, current hot Rx obesity drugs market and MDs adding Wegovy, Saxenda, Ozempic to their plans, recovery of medical programs since 2020
- Types of plans offered (low-cost, moderate-cost plans, estd. no. of hospitals providing each, typical cost), Medicare coverage
- Interviews with management at HMR, Medi-Weightloss, Weight Loss MD, Karol Clark
- Physician-based diet programs: diet drugs/other methods used, consumer attitudes, limitations, estd. no. MDs with a weight loss program – independents vs. affiliated with chains, meds used, typical cost of MD programs
- Profiles of a hospital-based weight loss program: Johns Hopkins

Major Medical Chains: Company Profiles: Lindora Clinics, Centers for Medical Weight Loss, Smart for Life, Medi-Weightloss Clinics, Medical Weight Loss of Michigan, Nuviva, Dr. G's, Let's Lose, JumpstartMD, Ideal Protein (in-depth descriptions, plan costs, estimated revenues, no. of centers, franchising growth strategies).

Tables:

- Avg. revenues per site, avg. plan cost to patient, avg. income statement, start-up Costs for top 8 medical weight loss chains/franchises/licensors.
- Value of The U.S. Medical Weight Loss Market: 2015-2022

Bariatrician (Obesity Medicine Specialists) Programs

329-336

- Status report of profession, OMA survey results (MDs by: age, income, size practice), how they're trained, number practicing, certification by OMA, use of diet drugs, treatment methods used, plan effectiveness/cost, business is up due to more surgeries, less surgeries – opinions of industry consultant.
- Estimated \$ value of the market for their programs: 2012-2027 F

The Weight Loss (bariatric) Surgery Market

337-360

- **Status Report: Effects of the pandemic on volume of procedures performed, revenues, 2021-2022 recovery**
- Discussion of sleeve, gastric bypass, lap band procedures, outcomes data status report & interviews with ASMBS President, a bariatric practice consultant
- Costs per surgery by type payor, pros/cons, who qualifies, **effect of Obamacare** on coverage by 25 state exchanges
- Surgery utilization and outcomes, mean cost per surgery, patient demographics
- Major insurers' coverage today, status report, Medicare coverage, role of liaison firms (Obesity Help, Barix Clinics, Journey Lite - addresses), avg. cost of surgery.
- Types of surgery: Roux-en-Y, lap banding, mini-gastric bypass, sleeve, consumer pros/cons

Table: No. of bariatric surgeries performed: 1992-2022

Table: \$ value of the market: 1992-2027 F, outlook under Obamacare

- Associations: ASBS, Obesity Action Coalition, increased lobbying efforts.

Table: \$ value of the market, by type surgery: 2022

VLCD/LCD Fasting Supplement Programs

361-383

- **Status report** of low-calorie modified fasting programs in 2022, effects of the pandemic, outlook by mgmt. at HMR, demand from hospitals for turnkey programs characterizing the mkt. (price, programs, no. of sites, increased direct-to-customer sales)
- Historical nature of market - development from 1970s-1990s, enrollments, drop-out/completion rates, problem on insurance coverage, market indicators, positive/negative trends/factors

Table: Marketdata estimates of VLCD enrollments for 1995-2022 (new vs. repeat patients, fasting vs. maintenance), \$ value of mkt. for 1984-2027 F.

Company Profiles: Detailed descriptions of companies/plans, program revenues:

Health Management Resources, Optifast (Nestle), Robard

Table: VLCD enrollments, \$ mkt. value: Marketdata estimates: 2007-2022.

The Diet Drugs Market

384-402

- Discussion: Strong recent growth of new Rx drugs (semaglutide) by Novo Nordisk fuels major boost in value of U.S. obesity meds market, MDs adding to their practices, viewing obesity as a disease, major obesity medications used today, role of MDs, commercial chains' involvement with diet drugs, why it has been tougher than thought to develop anti-obesity drugs that are effective and with minimal side effects.
- Status Report: strong sales of Wegovy, Ozempic, Saxenda (Novo Nordisk annual report, \$ sales) taken off the mkt., FDA rejections of: Acomplia, Taranabant, other Rx diet drugs
- New obesity drugs in development to 2026: semaglutide, Mounjaro (Lilly)
- Existing drugs used (Xenical, Phentermine) – descriptions
- Marketdata's 2023 and 2027 outlooks for prescription diet drugs, effect of new drugs on mkt. size, discussion of this market's potential vs. drawbacks, overcoming MD and consumer attitudes, side effects, effectiveness. Moderate weight loss not enough for most dieters.

Tables

- prescriptions written and \$ sales for: Meridia, Xenical, Phentermine, 12 other anti-obesity drugs (2003-2016)
- Estimated Value of Obesity Drugs Sales in the United States: 2004-2027

The Diet Books & Exercise DVDs Market

403-420

- Diet books – nature of the mkt., new titles for 2019-2022 diet books, buyer demographics, what makes bestsellers, book buyer demographics, recent popular titles
- Exercise DVDs & streaming services mkt., summary, top names in the field, categories, top distributors, mkt. size, why DVDs sales are falling/competition from streaming services
- Marketdata estimates of combined diet books/exercise DVDs mkts. For 2020, 2022 Outlooks and rationale, popularity as DIY method.

Table: \$ sales of diet books & exercise DVDs: 1989-2027 F

Company Profile: Beach Body

Reference Directory of Weight Loss Information Sources

421-427

- Industry & government trade associations, journals, newsletters, magazines, consultants