

The U.S. Medical Weight Loss Market: The Impact of GLP-1s On Doctors, Hospitals, Clinics and Franchises

- February 2025 -

Table of Contents

	Page
<u>Introduction, Scope, Methodology</u>	1-4
<u>Executive Overview</u>	5-12
<ul style="list-style-type: none">- Summary: discussion of medical weight loss mkt. characteristics, limitations, cyclical nature- Market definition and segments- Market structure: discussion of various types of programs & providers- Discussion of total diet market and medical market's major developments in 2023 & 2024- How the pandemic changed dieter behaviors	
<u>Tables:</u>	
<ul style="list-style-type: none">- Total weight loss market/mkt. segments \$ value: 2012-2028 Forecast- Medical weight loss market segments: \$ value (bariatric surgery, diet drugs, bariatricians' programs, hospital/clinic/MD programs, VLCDs market: 2016-2024	
<u>Hospitals, Medical Clinic Chains and Physicians' Weight Loss Programs</u>	13-67
<ul style="list-style-type: none">- Summary- Structure of the medical weight loss market, mix and \$ value by: hospitals private MD programs, clinic chains & franchises, Rx diet drugs, bariatric surgery, VLCDs- Types of plans offered (low-cost, moderate-cost plans, estd. no. of hospitals providing each, typical cost), Medicare coverage- Interviews with management at: Weight Loss MD bariatric practice, Weight Loss MD by Healthogenics, Vivaliti, Medi-WeightLoss Clinics- Status report: recovery since the pandemic, 2022 market performance- 2023 – 2024 market performance- 2028 growth forecast	
<u>Hospital-based Programs</u>	
<ul style="list-style-type: none">- Analysis of hospital involvement with weight loss programs- Samples of hospital-based weight loss programs: Brigham & Women's, Methodist University, UCSF	
<u>Physician-based diet programs</u>	
<ul style="list-style-type: none">- Weight loss drugs/other methods used, consumer attitudes, MD program limitations, estd. no. MDs with a weight loss program – independents vs. affiliated with chains, meds used, typical cost of MD programs, limitations- The Affordable Care Act - Insurance Coverage of Obesity Counseling	

Major Medical Chains & Franchises

- Medical clinic chain operating models
- Discussion of medical clinic franchising

Tables:

- number of MDs offering weight loss programs, by company
- Number of Medical Clinic Chain U.S. Locations
- Average Yearly Revenues Per Outlet or Program of The Top U.S. Medical Weight Loss Companies
- Average Cost To The Patient for a 12-16 week program
- start-up Costs for medical weight loss chains/franchises/licensors
- Average Income Statement for a Medical Weight Loss Franchise
- Value of The U.S. Medical Weight Loss Market: 2015-2022
- Number of U.S. Hospitals offering bariatric & Non-surgical weight loss services, by state: 2023

Company Profiles (in-depth descriptions, plan costs, estimated revenues, no. of centers, franchising growth strategies).

- Lindora Clinics
- Centers for Medical Weight Loss
- Medi-Weightloss Clinics
- Medical Weight Loss of Michigan
- Nuviva
- Dr. G's
- Let's Lose
- JumpstartMD
- Options Medical Weight Loss
- Ideal Protein

Bariatrician (Obesity Medicine Specialists) Programs

68-78

- Status report of profession, recent strong growth
- Profile of a bariatrician (MDs by: age, income, practice settings, size practice)
- Training, number practicing, certification by OMA, use of diet drugs, treatment methods used
- **Market size, effects of the pandemic, 2023-2024 market growth**
- **2028 growth forecast**

Table:

- Estimated \$ value of the market for bariatricians' programs: 2012-2028 F

The Weight Loss (bariatric) Surgery Market

79-100

- **Status Report: Effects of the pandemic on volume of procedures performed, revenues, Effect of the GLP-1s boom on number of surgeries**
- Findings of interview with Karol Clark, bariatric practice
- Affordable Care Act coverage, Medicare coverage, who qualifies for surgery
- Discussion of sleeve, gastric bypass, lap band procedures, outcomes data
- Costs per surgery by type payor, pros/cons,
- Surgery utilization and outcomes, mean cost per surgery, patient demographics
- Major insurers' coverage today, status report, Medicare coverage,
- Who provides services? - 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
- **Market Size: 2020-2022**, performance during the pandemic
- **Market performance 2023-2024**: competition from GLP-1 drugs, factors affecting demand.
- Associations: ASBS, Obesity Action Coalition, increased lobbying efforts.

Tables:

- Surgery patients, by sex, age, race, BMI
- No. of bariatric surgeries performed, by type: 2018-2022
- Total no. of surgeries: 1995-2028 F
- \$ value of the market: 1995-2028 F
- Market Value, by type bariatric procedure: 2015 – 2022

VLCD/LCD Fasting Supplement Programs

101-126

- **Status report** of low-calorie modified fasting programs in 2024, effects of the pandemic, demand from hospitals for turnkey programs
- **Merger of HMR with Profile Plan**
- Characteristics of the mkt. (price, programs, no. of sites, market trends)
- Historical nature of market - development from 1970s-1990s, enrollments, drop-out/completion rates, problem on insurance coverage, market indicators
- Positive/negative trends/factors affecting the market
- **Market performance in 2020 & 2022** during the pandemic
- **Market performance in 2023 & 2024**
- **2028 Forecast**

Tables:

- Marketdata estimates of VLCD enrollments for 2016-2024 (new vs. repeat patients, fasting vs. maintenance)
- \$ value of mkt. for 2014-2024
- Historical Dollar Value of the VLCD Programs Market: 1984-2028 F

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

- Health Management Resources
- Optifast (Nestle Health Sciences)
- Robard

The Prescription Weight Loss Drugs Market

127-151

- Discussion: how new GLP-1 drugs by Novo Nordisk and Eli Lilly have dominated the weight loss Since 2022.
- Trump Administration wild cards that could curtail growth
- FDA declares shortage of semaglutide is over, compounding pharmacies must stop
- User demographics: who drops out and why
- **2023 market performance**, estim. sales in U.S. – Wegovy, Saxenda, Ozempic, competition from Lilly (Zepbound, Mounjaro), market shares of the leaders
- **2024 market performance**: No. of Americans using GLP-1s, outlooks/forecasts by stock analyst, Marketdata estimates of market size
- **2028 Marketdata Forecast**, projections by UBS, PriceWaterhouseCoopers, Grandview Research
- New obesity drugs in development to 2030
- Factors affecting market growth to 2028: discussion
- Other obesity drugs taken off the mkt., FDA rejections of: Acomplia, Taranabant, etc.
- Profiles of major commercial diet companies selling GLP-1s: Weight Watchers (Sequence), Medifast (LifeMd)

The Telemedicine Market

- Size of the telemedicine market for GLP-1s, key metrics, why use soared during the pandemic
- **Profiles of: Ro.co, Noom, HimsandHers.com**

Tables

- U.S. Sales of the major weight loss drugs, by brand: 2022, 2023, 2024
- Estimated Value of weight loss Drugs Sales in the United States: 2004-2028

Reference Directory of Weight Loss Information Sources

152-154

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