

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"As what consumers consider "healthy" continues to evolve, diet products struggle to keep up with changing preferences. Packaged and processed foods continue to fall out of favor, shrinking the opportunity for diet foods but opening up new possibilities for services for people trying to lose weight convenience, speed, or support."

- Dana Macke, Senior Research Analyst, Lifestyles and Leisure

This report looks at the following areas:

- Nutrition knowledge isn't power
- · Dieters are thinking long-term
- · Organization leads to motivation

Definition

For the purposes of this Report, Mintel has used the following definitions:

"Diet" is defined as an eating or drinking regimen with the goal of losing or maintaining weight. Dieters are respondents who are currently trying or have ever tried to manage their weight by dieting. This Report covers diet products that are used primarily for weight control (weight loss and weight management).

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Nutrition knowledge isn't power

Figure 1: Level of nutrition knowledge, by weight-loss goals, June 2016

Dieters are thinking long-term

Figure 2: Attributes of effective diet plans, June 2016

Organization leads to motivation

Figure 3: Diet motivations, June 2016

The opportunities

More than half of Americans are dieting

Figure 4: Share of respondents who diet, June 2016

Dieters are largely positive about their chances of success

Figure 5: Attitudes toward dieting - Any agree, June 2016

Beliefs around diet and nutrition vary widely

Figure 6: Nutrition beliefs, June 2016

What it means

The Market - What You Need to Know

The market for diet products lacks growth

Segment growth comes from diet pills and meal replacements

Oprah reenergizes Weight Watchers

Obesity epidemic persists, but may not be recognized by individuals $\label{eq:condition} % \[\frac{\partial f}{\partial t} = \frac{\partial f}{\partial t} + \frac{\partial f}{\partial t} = \frac{\partial$

Market Size and Breakdown

Market for diet products holds steady

Figure 7: Total US sales and forecast of diet products, at current prices, 2011-15

Most diet product categories remain flat

Figure 8: Methods used to manage weight, February 2011-March 2016

Diet food and drink make up the bulk of the market

Figure 9: Total US sales of diet products, by segment, at current prices, 2015 (est)

Figure 10: Total US sales of diet products, by segment, at current prices, 2013 and 2015 (est)

Market Perspective

The Oprah effect

Subscription services renew enthusiasm for cooking

Wellness in the workplace



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Dieters move from "diet" products to "better-for-you" products

Figure 11: Ingredient avoidance in BFY Foods, by diet status, June 2016

Market Factors

Obesity rates refuse to budge

Figure 12: Percentage of overweight and obese Americans, 2000-14

Misperceptions of body weight can encourage sales of diet products

Figure 13: Calculated BMI and body weight perceptions, October 2015

Americans try to reduce the binge

Figure 14: Perceptions of overeating, February 2009-March 2016

Unbalanced diets perpetuate obesity epidemic

Figure 15: Percent of food group consumed, based on daily recommended amounts, 2014

Aging population may have to shift their perspectives on healthy food

Figure 16: BMI, by generation – Overweight or obese, October 2015

Key Players – What You Need to Know

Weight Watchers

Nutrisystem

Jenny Craig

The DASH Diet

The MIND Diet

Strengths and Weaknesses

Weight Watchers

Nutrisystem

Jenny Craig

The DASH Diet

The MIND Diet

Key Trends - What You Need to Know

Moderation isn't new, but it's catching on

Health content is ubiquitous across social channels

Calorie counters count on apps

Obesity rates haven't improved

Diet? Healthy? Light? Gross!

To eat, or not to eat, that is the question

What's Working?

Moderation reigns as the most popular diet choice

To post or not to post? Weight-loss groups gain traction on social

Figure 17: Weight Watchers \mid Introducing Beyond the Scale, December 2015

Figure 18: Strawberry mojito recipe, August 2016

Figure 19: Do the foods you eat affect your skin? | Herbalife nutrition advice, March 2016

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Why Can't We Accept Compliments? #NowBelievelt, August 2015

Health content draws engaged audience online

Herbalife's business model persists

Dieters count on apps to keep track

What's Struggling?

Healthy or not healthy? It can be hard to tell

Regular and diet soda fail to maintain market share

Nutrition guidelines shift (slowly)

Sustainability is key dieter challenge, not often addressed

Some see healthy choices as "girl food"

"Diet" is a dirty word

What's Next?

Is the microbiome the key to a healthy weight?

Fasting diets gain appeal and acceptance

The next level in sports nutrition

Juices, teas, and smoothies - the modern liquid diets

Eating for cognitive health

Calorie counting 2.0

The Consumer – What You Need to Know

A majority of Americans are actively seeking a healthy weight

Some amount of nutrition knowledge is standard, but few are experts

Paid communities are thought of as the most effective diet option

Building healthy habits leads to weight-loss success

Goal setting is a positive motivator for many

Dieting isn't easy (but anyone can do it)

Some are sensitive about weight and weight loss

Demographics of Dieters

Majority of Americans are watching their weight

Figure 21: Share of respondents who diet, June 2016

Figure 22: Change dieting from the previous year, 2009-16

Adults aged 25-34 are looking to lose

Figure 23: Key demographics of those dieting to lose weight, June 2016

Most looking to lose 20+ lbs

Figure 24: Weight-loss goals (lbs.) of dieters, June 2016

Food Choices of Dieters

Dieters and non-dieters make similar choices

Figure 25: Attitudes toward food, by diet status, June 2016

Fewer than half believe their diets are healthy

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Attitudes toward food, by diet status, June 2016

Nutrition Knowledge

Most Americans have some degree of nutrition knowledge

Figure 27: Level of nutrition knowledge, June 2016

Parents and adults under the age of 45 consider themselves experts

Figure 28: Level of nutrition knowledge, by key demographics, June 2016

Those invested in losing weight have educated themselves on nutrition

Figure 29: Level of nutrition knowledge, by weight-loss goals (lbs.), June 2016

There isn't one best way to lose weight

Figure 30: Nutrition beliefs, June 2016

Level of nutrition knowledge impacts diet beliefs

Figure 31: Nutrition beliefs - Part I, by level of nutrition knowledge, June 2016

Figure 32: Nutrition beliefs - Part II, by level of nutrition knowledge, June 2016

The most likely dieters prefer a "cheat day"

Figure 33: Nutrition beliefs – Cheat days, by age and gender, June 2016

Men more likely to lean on exercise to lose weight

Figure 34: Nutrition myths and truths, by gender, June 2016

Diet Plan Perceptions

Strengths and weaknesses of diet plans

Figure 35: Correspondence analysis - Diet plan perceptions, June 2016

Figure 36: Diet plan perceptions table, June 2016

Natural and healthy not always linked in consumers' minds

Figure 37: Diet plan perceptions – Healthy and natural attributes, June 2016

Expensive doesn't always equate to effective

Figure 38: Diet plan perceptions – Effective and expensive attributes, June 2016

Attributes of Effective Diets

Effective diets encourage a lifetime of good habits

Figure 39: Attributes of effective diet plans, June 2016

Setting up good habits is more appealing to older dieters

Figure 40: Attributes of effective diet plans – Long-term habits, by age, June 2016

Income level has little effect on diet perspectives

Figure 41: Attributes of effective diet plans – Select attributes, by household income, June 2016

Easy-to-follow diets appeal to those with low nutrition knowledge

Figure 42: Attributes of effective diet plans - Select attributes, by level of nutrition knowledge, June 2016

Young dieters want the real deal

Figure 43: Attributes of effective diet plans - Whole foods, by age, June 2016

Diet Motivations

Setting goals is a primary motivator



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: Diet motivations, June 2016

Young dieters take a social approach to weight loss

Figure 45: Diet motivations - Social components, by age, June 2016

Women find planning aids in success

Figure 46: Diet motivations – Select items, by gender, June 2016

Hispanic dieters plan with a friend

Figure 47: Diet motivations - Dieting with a friend, by race/Hispanic origin, June 2016

Attitudes toward Dieting

People have faith that weight-loss success is attainable

Many are diet agnostic

Weight loss still considered taboo

Some dieters feel disadvantaged

Figure 48: Attitudes toward dieting, June 2016

All ages feel their ideal figure is achievable

Figure 49: Attitudes toward dieting - Achieving the ideal body, by age, June 2016

Those aged 25-34 feel the most social pressure around weight loss

Figure 50: Attitudes toward dieting - Social pressures, by age, June 2016

Black dieters may have a more realistic perspective

Figure 51: Attitudes toward dieting - willpower, by race/Hispanic origin, June 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Consumer qualitative research

Abbreviations

Appendix - Market

Figure 52: Total US sales and forecast of diet products, at inflation-adjusted prices, 2011-15

Figure 53: Total US sales and forecast of diet products, by segment, at current prices, 2011-15

Figure 54: Methods used to manage weight, February 2012- March 2016

Appendix – Consumer

Figure 55: Food product preferences for current dieters, February 2008-March 2016



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100