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EXPORT MARKETING BUREAU  
G/F and 2/F DTI International Bldg.  
375 Sen. Gil Puyat Avenue  
Makati City 1200, Philippines

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Fax No.: (632) 8899.0111

<http://www.dti.gov.ph/exports/>  
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## Weight Management and Wellbeing in the US

**PROSPECTS**

**Wellness and Convenience Carrying Growth for Meal Replacements**

**M**eal replacements have seen increasing popularity in the US due to the shift in consumer attitudes towards weight loss and overall wellbeing. Historically, meal replacement products have been targeted towards consumers aiming to limit caloric intake or lose weight, which ultimately limited the scope of audience for these types of products. Over the past few years, the trend of wellness and faster-paced lifestyles has altered the way consumers interact with food choice. Expanded product offerings from the likes of Soylent and Premier Protein offer a specific calorie count, the majority of essential nutrients and vitamins, and come in a convenient on-the-go format. As consumers continue to further engage with their own nutrition and calorie counting, meal replacements have evolved to simplify the process of eating as well as fill a need for the way consumers are merging weight management and lifestyle.

**Weight Loss Supplements Continues Decline**

While meal replacement's sales continue to rise, weight loss supplements and diet pills' sales continue to decline. While these types of products appear as an easy solution for weight loss, they are often deemed as being somewhat unnatural or even unsafe in the eyes of some consumers. On multiple occasions over the past 30 years, weight loss supplement products containing harmful ingredients

have been recalled or even banned due to adverse health effects. While most weight loss supplements are completely safe and aid consumers by creating a sense of fullness or boosting metabolism, these products can be abused with improper usage. Many consumers are now opting for more well-rounded approaches to weight management featuring a complete diet and more exercise. As the FDA updates efforts to increase consumer awareness surrounding dietary supplement safety, consumers will be looking further into avoiding products associated with adulteration or causing harm.

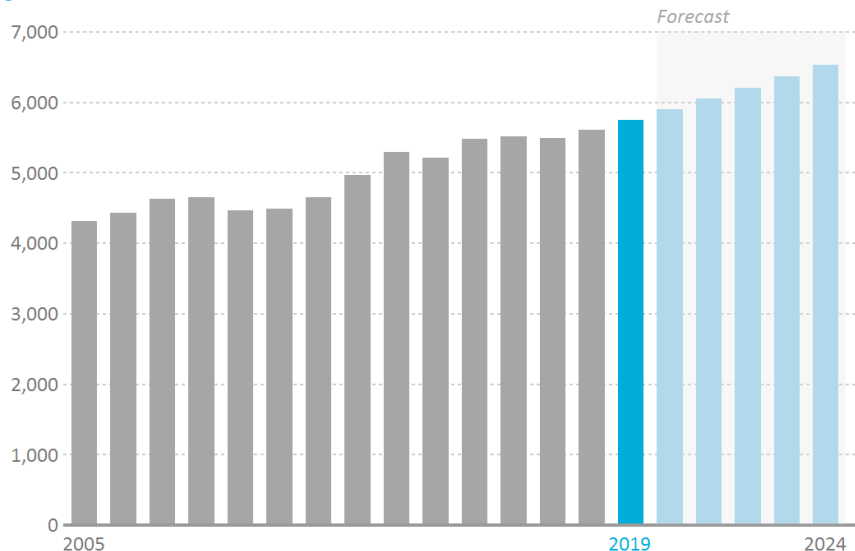
**Fitness Evolving to Reach New Consumers for Weight Loss**

To coincide with the wellness trend that has further manifested in 2019, the market for gyms and fitness studios has increased from greater demand. Younger millennial and Gen Z consumers coming from higher income classes have been raised with education that sedentary lifestyles and physical inactivity can lead to health complications later in life. To capitalize on the growing demand to be fit, larger gym businesses and boutique fitness studios such as Orange Theory and Equinox have recently seen profits increase and have subsequently opened more studios, with Orange Theory opening its 1000th store in 2019. This fitness trend has expanded the market for sports nutrition at the cost of weight management products. Product positioning is particularly valuable in aligning to new consumer values, thus weight management and wellbeing products likely could benefit from

**Sales of Weight Management and Wellbeing in USA**

Retail Value RSP - USD million - Current - 2005-2024

**5,728**



realigning their message to younger audiences and their tastes to prevent further movement away from the category.

**COMPETITIVE LANDSCAPE**

**Premier Protein Continues with Another Strong Year of Growth in 2019**

Premier Protein (Post Holdings) has continued in 2019 as one of the fastest growing players in meal replacement. Benefiting from consumer interest in adding more protein to their diet, the Premier Protein brand has distinguished itself with products bolstering high amounts of protein coming in a convenient ready-to-drink format. In 2018, the brand launched in its first clear protein beverage, which adds to its line of shakes, powders, and bars that come in a variety of flavors. Premier Protein has quickly risen to become one of the largest players in meal replacement due to its clear positioning on protein that coincides with increasing consumer interest for protein across weight management and wellbeing.

**Herbalife Bounces Back in 2018 from a Poor Performing 2017**

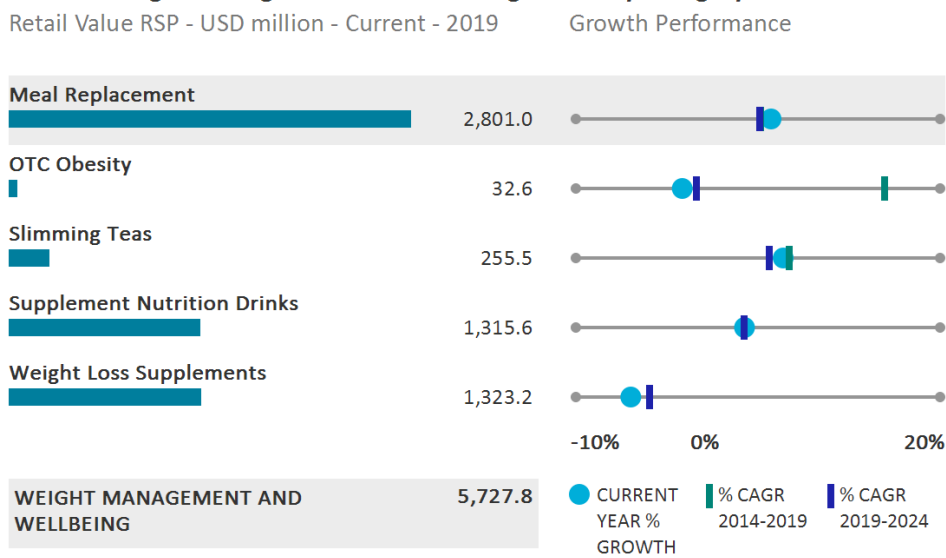
In 2018, Herbalife Nutrition benefited from newfound demand after the company struggled in 2017. Following the company’s restructuring

in the US due to FTC allegations and fine, Herbalife has managed to restore briefly lost sales for its products. In an effort to diversify its offering, the company has also turned to innovation to spur demand growth for its products. While Formula 1 remains the brand’s most popular product, Herbalife aims to push more into sports nutrition and health and wellness products in order to take advantage of changing consumer trends geared towards active lifestyles.

**Soylent Expanding Further Into Brick and mortar Channels**

Increasingly popular meal replacement brand Soylent (Rosa Foods) has moved its products further into brick-and-mortar channels in 2019. In 2018, Soylent launched its products into nearly 2,000 US Walmart stores, and in 2019 its distribution was expanded into over 4,000 locations. On top of the Walmart distribution, the brand also has recently partnered with Dot Foods, one of the US’ largest food distribution companies, to bring Soylent products to more grocery outlets nationwide. Soylent’s now extensive brick-and-mortar availability is telling of US consumers becoming open to trying or even opting for plant-based alternatives. Retailers are looking to satisfy changing consumer tastes, and Soylent has managed to fill the gap for plant-based meal replacements. ■

**Sales of Weight Management and Wellbeing in USA by Category**



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