

# Weight Loss Drugs and the Future of Weight Management and Wellbeing

November 2023

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## SCOPE OF THE REPORT

Key findings

## PROFILING THE WEIGHT LOSS DRUGS CONSUMER

The rise of weight loss drugs and the threat to consumer goods

Who are the likeliest consumers of weight loss drugs?

Evaluating consumers by income band and obesity concerns

Weight loss drugs consumers likelier to emphasise healthy weight among health priorities

Comparing meal replacement users with those who opt for more medical procedures

Building a profile of weight loss drugs consumers

## INTRODUCING THE WEIGHT LOSS DRUGS IMPACT MODEL

Introducing the Weight Loss Drugs Impact Model

Factors in the Weight Loss Drugs Impact Model

Why weight management and wellbeing is on the frontlines of weight loss drug disruption

Impact of GLP-1s on the US weight management industry varies by the product in question

Implications of GLP-1s for the US weight management and wellbeing market

Passport forecast is for minor decline, with recovery later in the forecast period

Baseline model: Static GLP-1 impact on the US weight management and wellbeing market

Scenario 1: Wide access and low costs paint a dire picture for weight management products

Scenario 2: A slower timeline for achieving accessible costs and commercialising innovation

Scenario 3: GLP-1 patients do not stay on these medications in the long term

Scenario 4: Weight management products are part of GLP-1 patients' regimens

Navigating weight loss drugs' impact on US weight management and wellbeing

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## GLOBAL PERSPECTIVES ON WEIGHT LOSS DRUGS

Projecting the next markets for GLP-1s

Consumer perceptions and cultural habits drive different motivations across markets

Strict regulations plus inconsistent or weak enforcement can distort country-level adoption

The UK: Awareness of weight management is high, but regulations limit access to drugs

Australia: Off-label use of Ozempic and shortages ahead

Spain: Consumers crave novel, fast and efficient products

The Middle East: Rising demand and shortages influence near-term adoption of GLP-1s

Brazil: High levels of informality allow for widespread access to weight loss drugs

Singapore: Obesity rate does not tell the whole story; telemedicine offers convenience

Perspectives on the spread of GLP-1s globally

## INDUSTRY ADAPTATIONS TO WEIGHT LOSS DRUGS

How can the weight management industry adapt to the challenge of GLP-1s?

Nestlé and the introduction of "companion" products to weight loss drugs

The opportunity for weight management to attract GLP-1 users as they cycle out

The allure of combining GLP-1s and weight management in one suite of products

Berberine promises natural alternative for blood sugar regulation to promote weight loss

The risk of viral social media campaigns

## WHAT TO EXPECT AFTER 2024

Reintroducing the factors: future implications for the global weight management industry

Opinions on effects beyond weight management

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