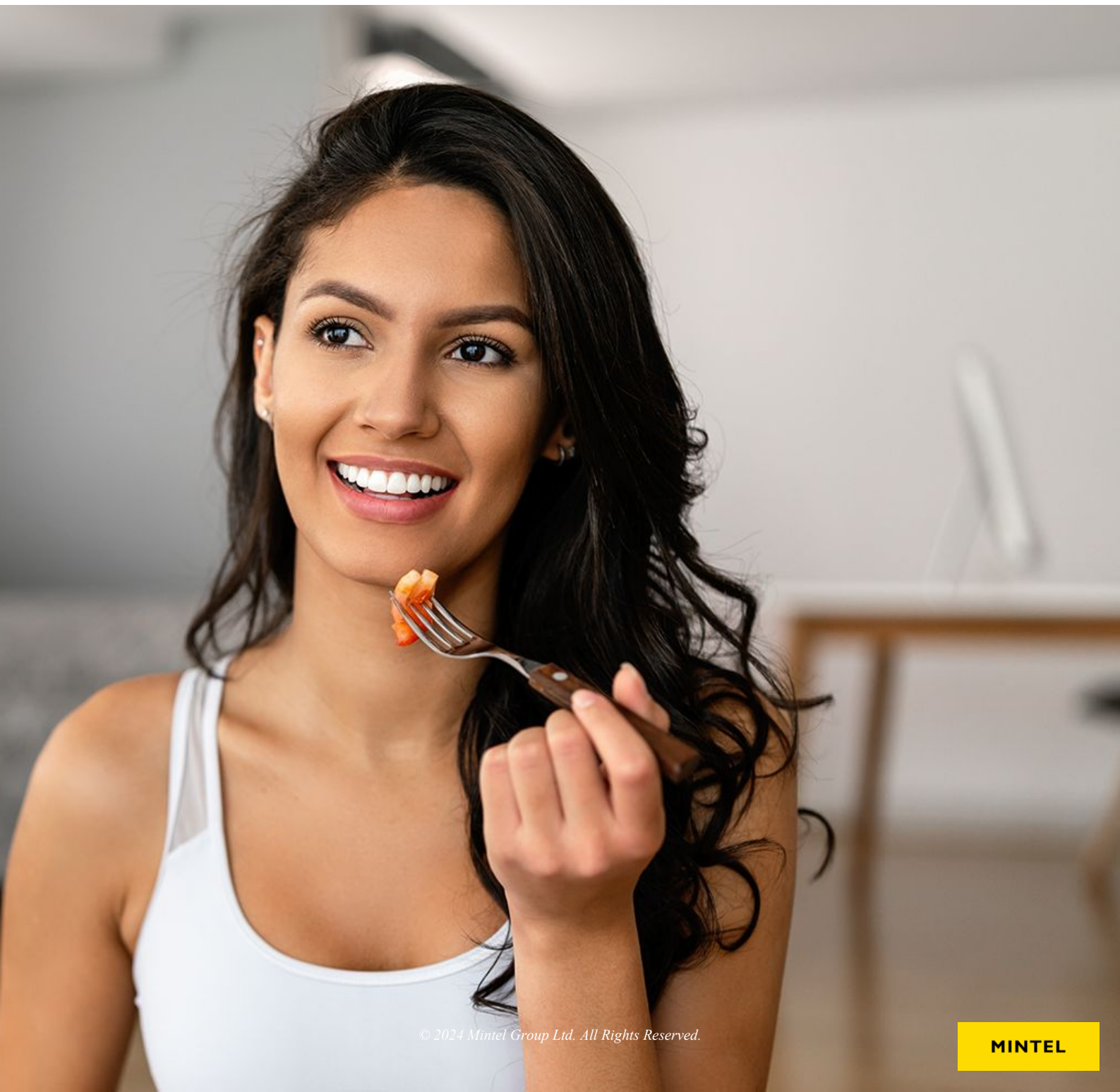


WEIGHT MANAGEMENT – GERMANY – 2024

As new trends are shaping the weight management market (eg semaglutide, glucose dieting), brands can draw Germans in by building on health technology, focusing on mental wellbeing and stigma prevention, and mimicking weight loss drugs through supplements.



Hannah Sandow, Health
& Wellbeing Principal
Analyst, Germany



Weight Management – Germany – 2024

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on weight management
- Germans' perception of their weight and their weight management intentions
- Weight management benefits Germans strive for
- Usage of and interest in weight management methods, including traditional approaches, like exercise, and less common approaches, such as weight loss drugs or CGMs
- Behaviours towards weight management, discussing blood glucose dieting, the influence of mental wellbeing and stigma on weight management
- Consumers' attitudes towards weight management, including attitudes towards weight management supplements, social media and gamified products
- Launch activity and innovation within weight management nutrition and performance nutrition



As new trends are shaping the weight management market (eg semaglutide, glucose dieting), brands can draw Germans in by building on health technology, focusing on mental wellbeing and stigma prevention, and mimicking weight loss drugs through supplements.

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Overview

66% of weight-managing Germans think it is more important to **improve their health** through weight management than their appearance. As a result, brands can align their weight management support with the health-focused benefits Germans hope to achieve. Improved mobility and prevention of chronic health conditions, for instance, claim top spots opening opportunities within exercise and nutrition.

While **healthy eating plays a crucial role in weight management**, 54% of Germans say **financial concerns** are more important to them than **weight management intentions**. Hence, as the cost of living crisis starts to ease, consumers' ability to prioritise health-related expenses, in particular nutritious food and drink products, should increase again.

Only 23% of weight-managing Germans think that weight management supplements are a healthy way to manage weight. Hence, interest in the future use of weight management supplements remains limited (29%) compared to other methods, like exercise. Brands can tap into botanicals that German health product users tend to perceive as safer.

Newly approved weight loss drugs are creating a stir but remain poorly accessible. This opens further opportunities for supplement brands to appeal to the **23% of weight-managing Germans** interested in using prescription weight loss drugs. Brands can focus on ingredients that mimic the effects of such weight loss drugs by improving satiety (eg **konjac root**) or stimulating GLP-1 production naturally (eg **berberine**).

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Report Content

EXECUTIVE SUMMARY

- The five year outlook for weight management

Market context

- Obesity levels continue to increase
- Healthy eating at risk during the cost of living crisis

Opportunities

- Offer mental health support within weight management
- Adapt to the semaglutide hype
- Encourage strength training at an old age for effective weight management

MARKET DRIVERS

The German economy

- 2024 is expected to remain challenging
 - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 2: financial confidence index, 2022-24
- The impact of the economy on weight management

Obesity

- The extent of Germany's obesity epidemic
 - Graph 3: trends in body mass index (BMI), 1999-2021
- Obesity causing concern for Germans' health
- Diabetes medication was authorised in Germany to treat obesity

Exercise

- Germans exercise frequency shows room for improvement
 - Graph 4: exercise frequency, by age, NET, 2023
- Revamp Germans' activity levels

Nutrition

- BMEL nutrition promotes drives the adoption of plant-based dietary choices
- Redefinition of the Nutri-Score emphasises stricter evaluations of ingredients

WHAT CONSUMERS WANT AND WHY

Current weight

- Germans' perception of their weight remains stable
- Support older generations in weight management
 - Graph 5: current weight by age, 2024
- Financially struggling Germans continue to be in need of weight management support

Weight management intentions

- Germans' efforts towards weight management stay consistent
 - Graph 6: weight management intentions, 2023-24
- Maintaining current weight becomes more relevant
- Raise awareness of ideal activity levels among German seniors
- Target young males with natural weight gain products

Weight management benefits

- Desire for greater mobility drives weight management intentions
- Help older consumers to improve mobility with weight management
- Consider mental health in exercise plans for weight management
- Focus weight management marketing on prevention of chronic health conditions

Weight management methods

- Exercise trumps all weight management methods
 - Graph 7: usage of and interest in weight management methods, 2024
- Foster strength training at an older age to manage weight
- Adjust portion sizes for weight-loss drug users
- Find new ways to enhance satiety and stimulate GLP-1 production
- Help Germans save time and money when dieting
- WeightWatchers app makes dieting easier for consumers
- Normalise meal replacement to reach Gen Z
- Leverage the interest in continuous blood glucose monitoring carefully

Behaviours towards weight management

- Health is at the top of weight-managing consumers' minds
 - Graph 8: behaviours towards weight management, 2024
- Build on the blood glucose trend to push wholegrain products
- Challenge pressure surrounding body image
- Asics celebrates the mental benefits of movement
- Help weight-managing Germans build resilience to overcome emotional eating

Weight Management – Germany – 2024

- Satisfy young men's demand for weight management supplements with convenient online shopping

Attitudes towards weight management

- Germans believe in the power of movement to enhance mood
 - Graph 9: attitudes towards weight management, 2024
- Boost Younger Millennials' exercise motivation with gamified weight management
- Fit forever fitness embraces the demand for gamified weight management products
- Leverage the demand for community support with weight management camps

LAUNCH ACTIVITY AND INNOVATION

Weight management nutrition

- Weight management nutrition NPD increased slightly
- Include botanical ingredients to give weight management supplements a healthier appeal
 - Graph 10: top 10 claims* in weight management nutrition NPD, 2019-24
- NPD examples of weight management nutrition with botanical/herbal claims
- Widen your focus in functional claims beyond slimming
 - Graph 11: top 10 functional claims in weight management nutrition NPD, 2019-24
- New launches in weight management nutrition feature a variety of health benefits
- Redesign weight management nutrition in line with Germans' priorities

Performance nutrition

- Performance nutrition NPD remains at a low level
- Leverage young male consumers' demand for weight gain to launch new products in performance nutrition
- Vitamin fortified claims strengthen their standing in performance nutrition NPD
 - Graph 12: top ten claims* in performance nutrition NPD, 2021-24
- Brands focus on including valuable vitamins in their new launches
- Jars remain most popular packaging type
 - Graph 13: performance nutrition NPD by packaging type, 2021-24

Advertising and marketing activity

- SHEKO promises maintaining and losing weight without feeling pressured
- Sanatura introduces a new innovative approach to losing weight

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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