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Getting Ahead of the Curve: Satiety

By Dr. A. Elizabeth Sloan

With safety issues and consumer skepticism looming over weight loss pills and metabolism-boosting thermogenic agents—and many waist-watchers, especially Boomers, re-focusing on food-based solutions—super-satiating foods, drinks and natural ingredients have tremendous potential to quickly corner the weight loss market.

Nearly four in 10 (39%) U.S. adults are watching their weight; 29% are trying to lose; and 13% are trying to maintain weight, according to Packaged Facts' 2010 "Weight Management Trends in the U.S." More than one-third (36%) of adults bought a functional food for weight loss last year, 33% for weight maintenance and 29% as a meal replacement per Mintel's 2009 "Functional Food-U.S." report. Weight loss/management foods/drinks posted sales of $18 billion in mass channels, excluding Wal-Mart, in 2009, reports SymphonyIRI.

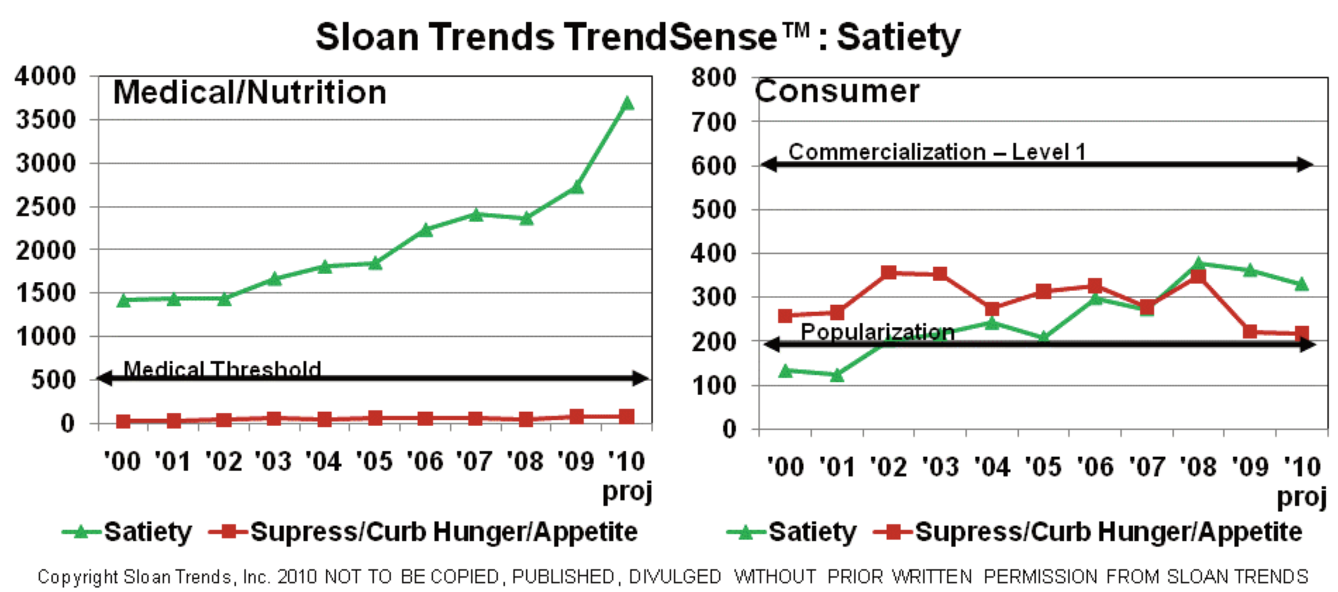
Perhaps most important, more than half (55%) of current dieters/weight managers have heard of or read about specific types of foods/beverages that can help them feel fuller longer; four in 10 feel knowledgeable about these foods/beverages—although only 5% claim to be very knowledgeable, according to the 2009 "Gallup Study of Satiety." The International Food Information Council (IFIC) says 70% of adults believe that specific foods/drinks can provide them with a feeling of fullness for a longer period of time. Four in 10 shoppers are extremely interested in buying/using foods that help keep them feeling fuller longer (HealthFocus, 2009).

Market Potential

According to Sloan Trends' TrendSense Model, satiety began solidly moving into the Popularization Phase in 2006, indicating that it was a viable market in specialty/health food channels and among very health conscious/condition-specific consumers. Most important, medical/research activity has accelerated throughout the decade. Medical Counts flattened in 2007 and 2008, but are exploding as researchers look for alternatives after the Hydroxycut recall. This reacceleration in Medical Counts will likely continue to push satiety toward Commercialization, signaling a mass market opportunity for satiety in the foreseeable future. It usually takes two years for accelerated medical activity to be reflected in the Consumer Counts.

Conversely, the marketability of appetite suppressants as diet aids and terms including suppress/curb hunger/appetite suppression—have begun to lose favor during the past two years and will likely remain associated with the negative aspects of weight loss pills. Weight control candy/tablets fell 15% in mass channels for the year ended 1/4/2010, reports Symphony IRI.

Marketers should be readying products that deliver satiating results using familiar, natural ingredients that are perceived as real food, e.g., dietary fibers including prebiotics and protein are top of the list. SymphonyIRI reports that low-fat, low calorie, reduced sugar and



** Although there are many factors that go into determining consumer trends, measuring how medical/nutrition activity levels have risen over the past decade, as well as some of the key milestones that have occurred and how these issues have been understood and embraced by the public are essential in predicting the sustainability of the Consumer trend line.*

high fiber/whole grains rank 4 on a 5 point scale for "must have" ingredients in a weight directed product. Sixty-one percent of the population regularly eats a light/lite/low calorie or diet food/beverage per NPD, 2010.

Growth Opportunities

• 68% of American adults are overweight; 34% obese (CDC, 2009).

• More than 25% of the population in 33 states is obese; 33% in nine states. In the past two years 2.4 million more Americans were classified as obese (CDC, 2009).

• 60% changed their diet in 2010; weight loss was the top reason for 65%; weight maintenance 16% (IFIC, 2010).

• 53% want more functional foods/drinks that maintain healthy body weight through satiety; this is consistent across all age groups, although interest among those 25-34 is somewhat lower at 44% (Mintel, 2009).

• Women 50+ (48%) feel they are the most knowledgeable about satiety; women aged 45-64 are the most likely to try to lose weight.

• Young men 18-34 (47%) rank 2nd in terms of knowledge of satiety and food. Young men are the most likely to say that protein is an important component of healthy eating (Mintel's, 2009).

• Super-satiating foods can be instrumental in combating childhood obesity; 1 in 3 American kids are overweight; 1 in 5 obese.

• Sedentary dieters with the most to lose (51%) feel they're very knowledgeable about satiety (Gallup, 2009).

• The global weight management market was estimated at $363 billion in 2009 and is projected to reach $586 billion by 2010 (BCC, 2009).

• Sales of consumer products with satiating ingredients approach/claim are $12 billion globally (Frost & Sullivan); 45% of global consumers are very/extremely interested in foods that could keep them feeling full longer (HealthFocus Global Study, 2008).

• 40% of consumers think that protein helps people feel full; 37% say high protein diets can help with weight loss (IFIC, 2010).

• 76% of consumers associated fiber with satiety; 76% fiber with weight control. In contrast, 36% associate whole grains with weight management (HealthFocus, 2009).

Functional Food & Beverages

According to HealthFocus, fruit/vegetable juice, yogurt, savory snacks and soup are the foods consumers say are most important in managing their weight. On an unaided basis, current dieters/weight managers are most likely to cite water (32%), fiber foods/high fiber 24%, protein 16%, fruits 14%, whole grains/vegetables 10%, Slim-Fast 8%, bars/energy bars 5% and bread 5% for fullness/satiation (Gallup, 2009).

Snacks are perfectly positioned for a satiating claim; 39% want more snacks to satisfy specific cravings and 29% to satisfy immediate hunger, according to IRI's 2010 "SnaxPo" report. Drinks or bars targeted with ethnic flavors for specific racial groups is a big idea: 74% of African Americans, 77% of Hispanics and 78% of Mexican Americans are overweight.

Breakfast foods are another natural opportunity for super-satiating foods; 65% of dieters say that breakfast is the most important meal of the day.

Dietary Supplements

In 2010, 16% of consumers took supplements for weight loss/management (Packaged Facts, 2010). In 2009, 5% of adults used non-prescription diet pills, 4% meal replacements and 3% reducing candies.

References furnished upon request.

About the author: Dr. A. Elizabeth Sloan is president of Sloan Trends, Inc., Escondido, CA, which is a consulting firm that offers trend-tracking and predictions, strategic counsel and business-building ideas for food, supplement and pharmaceutical marketers. Each month she will provide analysis and discuss opportunities of a particular market being covered in a given issue.

SLOAN TRENDS' TRENDSENSE is a 15-year-old trend tracking system, which identifies and quantifies trends as well as predicts the optimal timing, sustainability and life-cycle stage of ingredients, terms, product opportunities and related market issues.

The model displays medical and consumer "activity levels" based on a comprehensive analysis of five critical sources of information—consumer, trade and competitive, legal and regulatory and media coverage. The resulting charts give insight into the market's changing health issues and concerns, the ingredients that are up-and-coming and those that have just about run their course, as well as what health claims, marketing messages and products will bring your company the most success.

• **Emerging Phase** = Trends begin to appear on the radar screen. Companies should begin to collect literature and market details for those that exhibit continual growth and that might be of interest.

• **Popularization Phase** = Medical/Nutrition crossover to consumer media and marketplace; opportunity for niche or specialty markets. Marketers/manufacturers should begin a detailed evaluation of the supporting marketing and scientific data and determine if this term/trend offers a good strategic fit and is appropriate to pursue. Appropriate product development procedures should be undertaken.

• **Commercialization Phase** = Mass-market ready. Mainstream consumers have a significant degree of familiarity with the term/trend and there is opportunity for competitive advantage by getting out ahead of the competition or by providing a unique and highly innovative product positioning for success.