

# The U.S. Diet Food Home Delivery Market

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## Abstracts

This new Marketdata study examines the \$869 million diet food home delivery or “home meal replacement” market in the U.S. This is a niche segment of the overall weight loss market appealing to the most affluent dieters, that had grown rapidly until the recession hit. Research for this study was based mainly on primary research involving custom Marketdata telephone surveys of company management.

Roughly 40 companies compete. Some ship food nationwide while others provide fresh daily delivery to local markets such as New York City and Los Angeles. Profit margins vary greatly.

The study covers: nature/structure of the market, key demand factors, pricing, distribution & franchising, how companies are formed and operate, profitability/expense ratios, customer mix and demographics, market size (2005-2012, 2013 & 2017 forecasts), management outlooks and opinions of market growth and the competition.

Also Included: Complete Status Report of the Total Weight Loss Market, with outlooks for commercial, medical and retail programs, latest dieter trends, major market developments of 2011-2013, financials for the public diet companies, effects of the recession, ranking of top weight loss companies, 1989-2017 Forecasted market size/growth history, and more.

39 Competitor Profiles: NutriSystem, Jenny Direct, Medifast, Diet To Go, 5 Squares, BistroMD, The Fresh Diet, eDiets Meal Delivery, Chefs Diet, Freshology, Sunfare, Seattle Sutton’s Healthy Eating, HMR At Home, In The Zone, Personal Chef To Go, many more (address, program descriptions, prices, market outlooks, financials when available).

## Some Findings

The average monthly cost of a diet/healthy food home delivery plan is \$873.

Most companies held up well during the recession, and diversified into new markets.

We expect the market size to grow 4% in 2013 and 5%/year to 2017.

Most local daily fresh food services serve the LA and NYC markets and don't generate sales higher than \$2-5 million.

Some services have been around 20+ years but the market took off in 2002-2003.

60-70% of customers are female, and clients usually stay on plan 8-12 weeks.

Several new companies entered the market since 2011, with one obtaining \$1 million in investor financing. Franchising usually doesn't work well in this market.

Potential clients range from seniors to college students, working Moms, time-pressed executives, celebrities, and yuppies looking for convenience.

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### **INTRODUCTION & REPORT METHODOLOGY2**

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#### Nature & Structure of The Market

- Why The Demand?

- How Diet Food Home Delivery Services Operate: fresh vs. frozen, daily vs. weekly delivery

- How Diet Food Delivery Companies Are Formed, why some fail, start-up costs

- Number of Companies Offering The Service

- Pricing How Much Does Diet Food Home Delivery Cost?

- Competitors by delivery areas.

#### Market Size & Growth

- Highlights of all chapters, market size/growth 2005-2017 forecasts, major market trends and effect of the recession on major players, 2013 & 2017 forecasts/outlook, rationale

- Dieter and diet food delivery client demographics. Share of clients preferring home-based diet plans and diet company food (2005-2012)

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Demographics of The Typical Dieter Overall – Why diets fail, number of dieters by sex, frequency of diet attempts, most popular diet methods and products used major dieting trends of 2011-2013

The Potential Market– analysis of BestDietForMe.com visitors. Dieters by: gender, age, BMI, starting weight, special foods needs, budget, program location preferred, interest in food home delivery, type food plan desired, prior diet plans used, exercise preferences, psychological support needs (annual averages for 2005-2012)

Percent of dieters that prefer home-based diet plan, that are interested in diet food delivery, that prefer pre-packaged or company diet food (32 quarters' data: 2005-2012)

Number of dieting attempts per year (1989-2007)

Customer demographics for Jenny Craig (Jenny Direct), NutriSystem, other diet food delivery companies

Customer acquisition costs.

Estimated number of dieters by type program used; 2012

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Recent financial performance of NutriSystem, acquisition of eDiets.com by ASTV

Results of phone interviews with management at: The Fresh Diet, Bistro MD, Diet To Go

Various methods used to estimate market size: individual competitor sales vs. number of potential customers and avg. value per customer

2012 Estimate: discussion of revenues/expected growth for 2013

2017 Forecast: discussion of macro factors affecting demand, level of advertising, market maturation, the recession/economy, DIY dieting cycle, possible new competitors

Factors affecting demand and growth in 2009 to 2012 – discussion.

Estimated 2009, 2010, 2012 sales, by competitors (top 8 plus other competitors).

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Medifast, NutriSystem, eDiets.com 2009-2012 financial data, income, expenses by type, 2012 performance and information from latest conference calls.

UFOC franchise data for Seattle Sutton's Healthy Eating

Gross profit margin comparisons for 2008-2012, factors affecting profitability

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In-depth company descriptions, history, how the programs work, meal plan pricing, areas shipped to, findings of Marketdata phone interviews with management, company headquarters address/phone /website/key contact persons, distribution/franchising information, 2009-2012 financials for public companies, etc. for

### **Table: TOP COMPETITOR REVENUES: 2006, 2008, 2010, 2012**

5 Squares  
3 Hour Diet At Home  
Bistro MD  
California Chef Services  
Chefs Diet  
Club Gourmet  
Diet To Go  
Diet At Your Door  
Diet At Your Doorstep  
Diet Delivery/TSG Group (Canadian)  
Eat Like the Pros  
eDiets Meal Delivery  
Focus 28 Diet  
Freshology  
Fresh 'n Fit Cuisine  
Gourmet On the Go  
HMR At Home (Health Management Resources)  
Healthy Connections  
Healthy Heart Meals  
Healthy Living Foods  
In The Zone Delivery  
Jenny Direct (Jenny Craig)  
Magic Kitchen

Medifast  
Nutropia  
Nutrifit  
Nutrition In Motion (Canadian)  
NutriSystem  
Personal Chef To Go  
Pure Foods, Fresh Start  
Rawvolution  
Seattle Sutton's Healthy Eating  
Spa Meals To Go  
Susan's Healthy Gourmet  
Sunfare  
The Slimdown  
The Fresh Diet  
Z.E.N. Foods

## **TOTAL WEIGHT LOSS MARKET: STATUS REPORT (\$250)**

Latest 2011-2013 market trends and developments, analysis and discussion  
Frugal dieters/creating value diet plans, selling direct to consumers  
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Estimated number of dieters, by sex, by diet methods used  
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The top diet companies, by 2010 & 2012 sales  
Comparative cost of different kinds of diet programs  
Projected growth rates for each weight loss market segment to 2014  
Average cost of diet plans by type program  
Number of U.S. dieters by type program, 2012 estimates

## **REFERENCE DIRECTORY**

Directory of weight loss market studies, consultants, trade journals and associations

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