



# Getting Ahead of the Curve: Blood Sugar Control

By Dr. A. Elizabeth Sloan

Blood sugar management has finally become a very hot market. But, while many marketers mistakenly think that interest in blood sugar control is primarily being driven by the growing diabetic population, for the most part, it's all about weight.

Of the 54% of Americans who were watching their diet in 2009, 23% were trying to control their blood sugar level; 15% were trying to manage diabetes (Mintel's "Weight and Healthy Eating-US-2009"). According to Diabetes Daily (1/21/10), 46% of diabetics modified their diet slightly in 2009, but 33% couldn't monitor their diet to successfully control their diabetes.

And with four in 10 U.S. adults currently trying to lose or maintain weight, according to Packaged Facts, (May 2010, "Weight Management Trends in the U.S."), blood sugar management will be an enormous new weight control opportunity.

The blood sugar-weight connection first surfaced during the 2001-2004 low-carb movement. Since then, markets, terms and some ingredients associated

with blood sugar are starting to gain strength, including the Glycemic Index, low glycemic foods/beverages and others.

## Market Potential

According to Sloan Trends TrendSense model, interest in blood sugar control and blood sugar management for obesity/overweight are both fast accelerating, "Level 1" mass market opportunities that show little sign of slowing down.

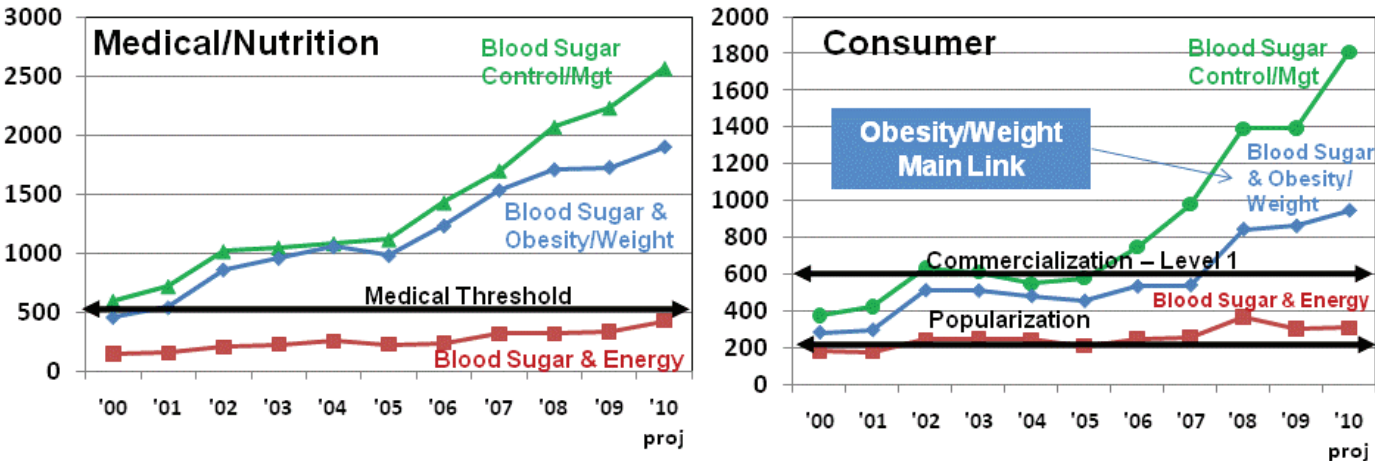
Although blood sugar was flirting with crossing over into the Commercialization Phase—indicating a viable mass market opportunity—during the low-carb era, it wasn't until the end of that movement in 2004 that Medical Research/Counts accelerated at a very rapid pace for both blood sugar management and blood sugar/obesity/weight. This caused the consumer marketability/receptivity curve to take off, right on target with the traditional two-year lag expected after a major "Medical Count" increase.

On the other hand, although blood sugar/energy crossed into "Popularization" during the low-carb era—indicating its appeal to health food specialty channel consumers and very health conscious and condition-specific shoppers—it has not yet crossed over the "Medical Threshold," which means it currently lacks the scientific support necessary to drive a potential long-term market and will likely remain a short-term fad. (See the TrendSense Figures below.)

## Growth Opportunities

- Half (53%) of consumers want functional foods/beverages that promote healthy blood sugar levels; 64% that help maintain a healthy body weight (Mintel FX Food Rpt. 2009).

### TrendSense™ : Blood Sugar Control/Management



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\* 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.

- Those aged 55+ (62%) are the most interested in foods/beverages that help maintain healthy blood sugar levels; one-third of the U.S. population is currently over age 55 (Mintel, Fx Food Rpt. 2009).
- Blacks and Hispanics are more likely to be watching their blood sugar level than Whites (Mintel, 2008).
- 68% of American adults are overweight; 34% obese.
- Americans got heavier during the recession; 2.4 million more became obese (CDC, 2010).
- 55% of Millennials, 53% of Gen Yers and 54% of Boomers live in a household concerned with, or treating, overweight (Hartman, 2010).
- The total U.S. weight loss market is estimated to reach \$68.7 billion by 2010 (Marketdata Enterprises, 2010).
- According to surveys by the Calorie Control Council, in 2009, 72 million Americans were on some kind of diet, a 35% increase from the year 2000.
- There are opportunities for multi-functional weight loss products—lack of energy is among the most important motivators for dieters (IFIC, 2010).
- 26 million U.S. adults/kids have diabetes; 1.6 million new cases per year, 22.7 million households affected (Am. Diabetes Foundation, 2010).
- Boomers are moving into the age group when most likely to be diagnosed with diabetes—age 40-64 (Am. Diabetes Foundation, 2010).
- 58 million adults are pre-diabetic; 40 million households affected by Metabolic Syndrome.
- Increasing ethnic mix fuels diabetes growth, incidence 6.6% Whites, 11.8% Blacks, 10% Hispanics, 7.5% Asian Americans (Am Diabetes Foundation, 2010).
- Globally, 285 million diabetics in 2010: India 51 million #1; China 43 million #2 (World Diabetes Federation, 2010).
- The global weight management market continues to grow despite the current downturn in the economy and is estimated to reach \$586 billion in 2014 from about \$363 billion in 2009 (MarketsandMarkets, “Global Weight Loss and Diet Management Market, 2009”).

### Functional Foods

Sales in the diet/weight loss food and beverage arena topped \$18 billion in food, drug and mass merchandisers (excluding Wal-Mart) in 2009, according to SymphonyIRI. In 2009, 1045 weight loss foods and beverages were launched in North America (Innova Market Insights).

Weight loss cereals were among the hot products in 2009, up 9.2% in sales, bars 24%, soup 6.2% and refrigerated juices 21% (IRI, 2010). Breakfast foods that help control blood sugar may be a big idea for weight watchers. Packaged Facts reports that 65% of weight loss consumers say breakfast is the most im-

portant meal of the day; 62% of weight managers. IFIC reports that 54% of non-regular breakfast eaters believe that breakfast can help maintain a healthy body weight.

### Dietary Supplements

Dietary supplements that help to control blood sugar levels and lose weight are a growing opportunity. In 2009, 761 weight loss supplements were launched around the globe. With only 12% of U.S. consumers using a dietary supplement to treat diabetes in 2009, 19% food/drinks and 64% Rx drugs, according to HealthFocus, supplements that help to control blood sugar for weight are a very big idea.

### 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.