

China Food For Special Medical Purpose Market Size, Share & Trends Analysis Report By Route Of Administration (Oral, Enteral), By Product (Pills, Powder, Liquid), By Application, By Modules, By Sales Channel, And Segment Forecasts, 2025 - 2030

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Abstracts

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Market Size & Trends

The China food for special medical purpose market size was estimated at USD 2.27 billion in 2024 and is expected to grow at a CAGR of 6.58% from 2025 to 2030. The growth is attributed to the aging population, increasing prevalence of chronic diseases, rising malnutrition rates, and supportive regulatory frameworks. These factors contribute to the expanding demand for specialized nutritional products tailored to meet the unique needs of various patient groups. For instance, in July 2022, Nestl? introduced China's first food for special medical purpose (FSMP) specifically designed for patients with tumor-related conditions, following a five-year approval process by Chinese regulatory authorities.

The rising prevalence of chronic diseases such as hypertension, diabetes, and cancer is another significant driver. These conditions often lead to complications such as malnutrition and weight loss, increasing the need for specialized nutritional interventions. FSMPs formulated to support individuals with chronic illnesses help manage symptoms, improve quality of life, and reduce healthcare costs associated with malnutrition and related complications.

The Chinese government maintained the regulatory framework for Foods for Special

Medical Purposes (FSMPs), with growing advocacy for future reimbursement coverage. The regulatory oversight for FSMPs is managed by the National Medical Products Administration (NMPA), formerly the China Food and Drug Administration (CFDA), facilitating product approvals and supporting market growth. As of September 2024, China had 206 registered FSMPs; of these, 174 are domestically produced, while 32 are imported, with domestically produced products significantly outnumbering imported ones. Among the approved products, 153 are powdered, and the remaining 53 are liquid.

A total of 66 FSMP products were approved for registration in 2024, originating from 17 different provinces and regions across China. Jiangsu, Shandong, and Heilongjiang emerged as the top three contributors, with 21, 10, and 6 approvals, respectively. These figures represent 32%, 15%, and 9% of the total registrations for the year.

The COVID-19 pandemic impacted China's FSMP market by accelerating the demand for clinical nutrition products amid increased health awareness and medical needs. During the pandemic, the focus on patient care for vulnerable populations, such as those with chronic illnesses or compromised immunity, increased the reliance on specialized nutritional support to aid recovery and improve health outcomes. Several sectors faced economic downturns and cautious consumer spending, and healthcare and nutrition-related industries, including FSMP, saw growing attention due to their critical role in disease management and prevention. In addition, the pandemic expedited digital transformation and modernization in China's healthcare system, facilitating better distribution, remote consultations, and awareness of FSMP products. The challenges, such as disrupted supply chains and regulatory adjustments, influenced market dynamics. Overall, COVID-19 catalyzed increased clinical nutrition adoption in China, setting the stage for sustained growth in the FSMP market as part of the country's broader healthcare recovery and modernization efforts.

China Food For Special Medical Purpose Market Report Segmentation

This report forecasts revenue growth at the country level and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2030. For this study, Grand View Research has segmented the China food for special medical purpose (FSMP) market report based on route of administration, product, application, modules, and sales channel.

Route of Administration Outlook (Revenue, USD Million, 2018 - 2030)

Oral

Enteral

Product Outlook (Revenue, USD Million, 2018 - 2030)

Pills

Powder

Liquid

Others (semisolid, semiliquid)

Application Outlook (Revenue, USD Million, 2018 - 2030)

Chronic Kidney Disease

Minimal Hepatic Encephalopathy

Chemotherapy Induced Diarrhea

Pathogen Related Infections

Diabetic Neuropathy

ADHD

Depression

Alzheimer's Disease

Nutritional Deficiency

Orphan Diseases

Tyrosinemia

Eosinophilic Esophagitis

Food Protein Module-induced enterocolitis syndrome (Food Protein Module-induced enterocolitis syndrome (FPIES))

Phenylketonuria (PKU)

Maple syrup urine disease (Maple syrup urine disease (MSUD))

Homocystinuria

Others (Urea Cycle Disorder (UCD), Glycogen Storage Disease (GSD), etc.)

Wound Healing

Chronic Diarrhea

Constipation Relief

Protein Booster

Dysphagia

Pain Management

Parkinson's Disease

Epilepsy

Other Cancer related treatments

Severe Protein Allergy

Cancer

Cachexia

Other (debilitating conditions, COPD, etc.)

Modules Outlook (Revenue, USD Million, 2018 - 2030)

Amino Acid Module

Protein Module

Vitamin & Mineral Modules

Fatty Acid based Modules

Carbohydrate Modules

Fiber Modules

Ketogenic Modules

Peptide based Modules

Hypoallergic Modules

Others (Electrolyte Module, etc.)

Sales Channel Outlook (Revenue, USD Million, 2018 - 2030)

DTC Sales Channel

Online Sales

Retail Sales

Institutional Sales

Hospitals

Others (Long-term Care Facilities, etc.)

Companies Mentioned

Danone (Nutricia)
Nestl?
Abbott
Fresenius Kabi AG
Mead Johnson (Reckitt Benckiser)
Maifu Nutrition technology
Jiangsu Hengrui Pharmaceuticals Co., Ltd.
H&H Group (Biostime)
Synutra, Inc.
Beingmate global
Taicang Puyuan Pharmaceutical Co.
Jiangsu Chia Tai Fenghai Pharmaceutical Co., Ltd.
Ainuo Instrument Co., Ltd.
Kunyu Health Pharmaceutical Jiangsu Co., Ltd.
Shijiazhuang Junlebao Taixing Dairy Co., Ltd.
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