

Medical Foods Market Report by Product (Pills, Powder, and Others), Route of Administration (Oral, Enteral), Application (ADHD, Depression, Diabetes, Cancer, Alzheimer's Disease, Metabolic Disorders, and Others), Distribution Channel (Supermarkets, Hospital and Retail Pharmacies, Online Pharmacies, and Others), and Region 2023-2028

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Abstracts

The global medical foods market size reached US\$ 22.0 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 30.7 Billion by 2028, exhibiting a growth rate (CAGR) of 5.7% during 2022-2028. The escalating health consciousness among consumers, the growing inclination toward nutritional solutions for managing health conditions among younger and older consumers, and the integration of genomics and other advanced technologies are among the key factors driving the market growth. Medical foods are specially formulated food products intended to be used under medical supervision for the dietary management of specific medical conditions. Unlike regular foods, medical foods are created to meet specific nutritional requirements and are often used to manage diseases or conditions that require particular dietary adjustments. For instance, they may be prescribed for individuals suffering from nutrient malabsorption, metabolic disorders, or specific types of food allergies. It's crucial to note that medical foods are not the same as dietary supplements. While dietary supplements are intended to supplement the diet, medical foods are meant to manage a distinct nutritional deficiency or imbalance that is medically diagnosed. Medical foods must comply with regulations, which include rigorous safety and labeling standards. These products are generally only available through healthcare providers and should be used as part of a comprehensive medical treatment plan.

The increasing health consciousness among consumers majorly drives the global

market. Consumers are becoming more proactive about managing their health and are more receptive to the idea of using specialized foods as part of their treatment plan. Additionally, both younger and older consumers are showing an inclination toward nutritional solutions for managing health conditions. Thus, the rise in consumer education and digital platforms offering health advice has further fueled this trend. One crucial factor contributing to the growth of the medical foods market is the global increase in the aging population. Older adults often face multiple health challenges, including malnutrition, reduced ability to absorb nutrients and chronic conditions such as Alzheimer's and Parkinson's diseases. As the percentage of the elderly continues to grow, especially in developed countries, the demand for medical foods customized to meet their specific needs is expected to rise. In addition, the integration of genomics and other advanced technologies into healthcare is making personalized nutrition a possibility, thereby offering a considerable market opportunity for medical foods. Moreover, public and private partnerships in research and development are creating a positive market outlook.

Medical Foods Market Trends/Drivers:

Increasing Prevalence of Chronic Diseases

One of the significant market drivers for the medical foods industry is the rising prevalence of chronic diseases such as diabetes, cardiovascular disorders, and metabolic syndromes. Chronic conditions often necessitate specific nutritional interventions to manage symptoms and improve quality of life. As healthcare providers and patients become more aware of the role that diet plays in managing these conditions, the demand for specialized medical foods is accelerating. For instance, medical foods formulated to manage diabetes can help control blood sugar levels, thereby reducing the need for medication and mitigating complications. Such targeted nutritional solutions can complement traditional medical therapies, sometimes offering an alternative to pharmaceuticals with fewer side effects. This increasing prevalence of chronic diseases, coupled with growing awareness about the benefits of medically supervised dietary management, is creating a favorable market environment for the expansion of medical foods.

Advancements in Nutritional Science

Another market driver is the rapid progress in nutritional science and research, which has led to the formulation of increasingly effective medical foods. Additionally, the deepening understanding of the role of nutrients at the cellular and metabolic levels has made it possible to develop products tailored to specific conditions. This scientific innovation allows for the precise treatment of diseases like inborn errors of metabolism or certain gastrointestinal disorders where conventional therapies might not suffice. Advancements in food technology have also enabled the production of medical foods that are more palatable, easy to consume, and shelf-stable, thereby enhancing user

compliance. As research continues to unfold, there is a growing demand for a broader range of medical foods designed to meet the unique nutritional requirements of individuals with various medical conditions, thereby fueling market growth.

Regulatory Support and Standardization

The medical foods industry has also benefited from robust regulatory frameworks that ensure product safety and efficacy. In confluence with this, regulatory agencies have well-defined guidelines for the classification, labeling, and marketing of medical foods. This has instilled confidence among healthcare providers and consumers alike, encouraging the prescription and use of these specialized products. Apart from this, compliance with rigorous standards ensures that medical foods meet specific nutritional needs based on recognized scientific principles. This regulatory support contributes to establishing the medical foods industry as a credible and essential part of healthcare, promoting its growth.

Medical Foods Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the medical foods market report, along with forecasts at the global, regional and country levels for 2023-2028. Our report has categorized the market based on product, route of administration, application, and distribution channel.

Breakup by Product:

Pills

Powder

Others

Powder holds the largest market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes pills, powder, and others. According to the report, powder accounted for the largest market share.

The medical foods industry is witnessing a growing demand for powder-based products, driven by several key factors. One primary driver is the ease of storage and transportation that powdered formulations offer. Unlike liquid or semi-solid medical foods, powders are less susceptible to spoilage and can have a longer shelf life. This makes them particularly advantageous for healthcare settings that require bulk supplies or for areas where distribution logistics may be challenging. Additionally, powdered medical foods offer versatile consumption options; they can be easily mixed with liquids or incorporated into soft foods, thereby increasing compliance among patients who might have difficulty swallowing pills or consuming liquid formulations. Moreover, the preciseness in dosage adjustment is another market driver. Healthcare providers can accurately customize the dose of nutritional elements by measuring the amount of powder, enabling tailored treatment plans for individual patient needs. Technological advancements in microencapsulation and spray drying techniques have also improved

the solubility and taste profile of powdered medical foods, making them more palatable for consumers.

Breakup by Route of Administration:

Oral

Enteral

Oral accounts for the majority of the market share

A detailed breakup and analysis of the market based on the route of administration has also been provided in the report. This includes oral and enteral. According to the report, oral accounted for the largest market share.

The oral route of administration is experiencing significant growth in the medical foods industry, underpinned by the ease of consumption and patient compliance. Oral medical foods, often available in the form of capsules, tablets, or liquid suspensions, are generally easier for patients to take as part of their daily routine, compared to other routes, such as intravenous or injectable forms. This simplicity encourages better adherence to treatment plans, thus improving patient outcomes. Additionally, oral administration is usually more cost-effective and less labor-intensive, which is particularly appealing for healthcare systems aiming to optimize resources. There are no costs associated with specialized administration equipment or healthcare personnel required for injections, thereby making it a financially viable option. Along with this, the development and manufacturing processes for oral medical foods often benefit from well-established technologies and quality control measures, resulting in a quicker time-to-market. Moreover, oral medical foods can be easily integrated into personalized medicine regimes, allowing for adjustments in dosage and timing to meet individual needs. This customization enhances the overall efficacy of treatment, further driving the market for the oral route of administration in medical foods.

Breakup by Application:

ADHD

Depression

Diabetes

Cancer

Alzheimer's Disease

Metabolic Disorders

Others

Diabetes holds the largest market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes ADHD, depression, diabetes, cancer, Alzheimer's disease, metabolic disorders, and others. According to the report, diabetes accounted for the largest market share.

The rising incidence of diabetes globally is a compelling market driver for the medical

foods industry. Diabetes often requires long-term dietary management alongside pharmaceutical treatment to control blood sugar levels effectively. Medical foods specifically formulated for diabetic patients offer targeted nutritional components that can aid in glycemic control. As healthcare providers and patients alike recognize the importance of dietary strategies in managing diabetes, there is an increased propensity to incorporate medical foods into treatment plans. This growing awareness is supported by clinical studies that validate the efficacy of specific medical foods in improving diabetes-related outcomes. Moreover, the search for alternatives to pharmaceuticals or complementary treatments with fewer side effects is boosting the demand for medical foods. With diabetes being a chronic condition, long-term use of such medical foods is anticipated, thereby providing a stable and expanding market. The rising healthcare expenditure and growing support from regulatory bodies for safer and more effective treatment options also fuel this trend. Overall, the rise in diabetes cases, coupled with the need for comprehensive treatment approaches that include dietary management, propels the market for medical foods in diabetes applications.

Breakup by Distribution Channel:

Supermarkets

Hospital and Retail Pharmacies

Online Pharmacies

Others

Hospital and retail pharmacies account for the majority of the market share

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes supermarkets, hospital and retail pharmacies, online pharmacies, and others. According to the report, hospital and retail pharmacies accounted for the largest market share.

Hospital and retail pharmacies serve as a significant distribution channel for medical foods, driven by various market factors. Additionally, the immediate availability of medical foods in hospital settings facilitates quick initiation of nutritional therapy, often critical for patient recovery or disease management. Along with this, the hospital environment allows for integrated care, where healthcare professionals can directly supervise the usage of medical foods, ensuring proper dosage and compliance. This is particularly relevant for conditions that require acute care or for post-operative patients who might need specialized nutritional support. They play a crucial role in the distribution of medical foods. As healthcare systems increasingly focus on outpatient care and home-based management for chronic conditions, retail pharmacies become the go-to source for long-term supplies of medical foods. The convenience of local or online retail pharmacies makes it easier for patients to maintain their treatment plans. In addition, retail pharmacists are becoming more educated about medical foods, allowing them to offer valuable advice to customers and potentially influence purchasing

decisions.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest medical foods market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America exhibited the largest segment.

The medical foods industry in North America is experiencing robust growth, driven by the region's advanced healthcare infrastructure, which enables rapid adoption of innovative medical foods. The strong presence of research institutions and leading companies in the sector also contributes to product development and market penetration. Regulatory support from agencies enhances the credibility of medical

foods, encouraging healthcare providers to incorporate them into treatment plans. Additionally, the higher healthcare expenditure in North America allows for the integration of specialized products, including medical foods into mainstream medical care. Apart from this, the rise in lifestyle-related chronic diseases such as obesity, diabetes, and cardiovascular conditions further fuels demand, as medical foods offer targeted dietary management for these issues. Moreover, consumer awareness about the benefits of medical foods is relatively high, thanks to extensive educational campaigns and easily accessible information. Moreover, the growing trend of personalized medicine in the region aligns well with the customization possibilities that medical foods offer, adding another layer of market appeal.

Competitive Landscape:

The key players are investing heavily in research to create innovative medical food formulations that are scientifically proven to address various medical conditions. They are working with healthcare professionals and scientists to ensure their products are effective and safe. Along with this, medical food companies continually refine and expand their product lines to cater to a wide range of medical conditions, such as diabetes, metabolic disorders, and gastrointestinal diseases. Thus, they are developing customized nutritional solutions to manage these conditions. In addition, companies adhere to strict quality control measures and compliance with regulatory standards to maintain the integrity of their medical foods. Apart from this, collaboration with healthcare institutions, research organizations, and advocacy groups is positively influencing the market. These partnerships help validate the efficacy of their products and expand their reach. Furthermore, companies are offering resources, such as dietitian support and educational materials, to help individuals make informed choices. Therefore, this is contributing to the market.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Abbott Healthcare Private Limited

Alfasigma S.p.A.

Danone S.A.

Fresenius Kabi AG

Mead Johnson & Company LLC (Reckitt Benckiser)

Medtrition Inc.

Meiji Holdings Co. Ltd.

Metagenics Inc. (Altacor)

Nestlé S.A.

Primus Pharmaceuticals Inc.

Targeted Medical Pharma Inc.

Victus Inc.

Recent Developments:

In March 2023, Abbott Healthcare Private Limited stated that its FreeStyle Libre 2 and FreeStyle Libre 3 integrated continuous glucose monitoring (iCGM) system sensors have received approval from the US Food and Drug Administration (FDA) for connection with AID systems. Abbott changed the sensors to allow for connection with AID systems.

In August 2022, Alfasigma S.p.A. signed a contract for acquiring all of the stock in SOFAR S.p.A., an Italian pharmaceutical business with more than 50 years of experience in the development, manufacture, and distribution of pharmaceuticals, medical devices, and dietary supplements.

In March 2022, Ivenix, Inc. stated that it has signed a binding contract to be bought by Fresenius Kabi. Combining the cutting-edge infusion system from Ivenix with the intravenous fluids and infusion treatment options from Fresenius Kabi will provide American hospitals access to a wide range of infusion goods.

Key Questions Answered in This Report

1. What was the size of the global medical foods market in 2022?
2. What is the expected growth rate of the global medical foods market during 2023-2028?
3. What has been the impact of COVID-19 on the global medical foods market?
4. What are the key factors driving the global medical foods market?
5. What is the breakup of the global medical foods market based on the product?
6. What is the breakup of the global medical foods market based on the route of administration?
7. What is the breakup of the global medical foods market based on the application?
8. What is the breakup of the global medical foods market based on the distribution channel?
9. What are the key regions in the global medical foods market?
10. Who are the key players/companies in the global medical foods market?

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