

Parenteral Nutrition Market Forecasts to 2030 – Global Analysis By Product Type (Total Parenteral Nutrition (TPN) and Partial Parenteral Nutrition (PPN)), Nutrient Type, Route of Administration, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Parenteral Nutrition Market is accounted for \$7.5 billion in 2024 and is expected to reach \$11.4 billion by 2030 growing at a CAGR of 7.0% during the forecast period. Parenteral nutrition (PN) is a medical treatment that provides essential nutrients directly into the bloodstream, bypassing the digestive system. This is typically used for patients who cannot absorb nutrients through normal eating due to conditions like gastrointestinal disorders, surgeries, or severe malnutrition. PN delivers a customized mixture of carbohydrates, proteins, fats, vitamins, and minerals through an intravenous line, ensuring the patient receives adequate nutrition for recovery and maintenance of body functions. It can be short-term or long-term depending on the patient's needs.

According to the U.S. Centers for Disease Control and Prevention (CDC), the preterm birth rate in the country was approximately 10.4% in 2022. In addition, during the same period, the preterm birth rate for African American women was around 14.6%.

Market Dynamics:

Driver:

Rising prevalence of chronic diseases

The rising prevalence of chronic diseases, such as cancer, diabetes, and

gastrointestinal disorders, is driving the growth of the market. These conditions often impair nutrient absorption, necessitating intravenous nutrient support. As more patients require tailored nutrition to manage malnutrition and recovery, the demand for parenteral nutrition solutions increases. This trend is prompting innovations in the formulations and improving patient outcomes, thus expanding the market.

Restraint:

Limited reimbursement coverage

Limited reimbursement coverage for parenteral nutrition presents a significant challenge in the market, hindering access for many patients who need long-term nutritional support. Insufficient insurance reimbursement can lead to high out-of-pocket costs, making the treatment financially burdensome. This restricts patient access to essential care, particularly for those with chronic illnesses or in home healthcare settings. Consequently, the lack of adequate coverage can delay treatment and negatively impact patient outcomes.

Opportunity:

Growing demand for home healthcare

The growing demand for home healthcare is contributing to the expansion of the market. Patients requiring long-term nutritional support are increasingly being treated at home, reducing hospital stays and healthcare costs. Advances in home administration, including portable infusion pumps and improved formulations, are making it safer and more convenient for patients. This shift toward home healthcare is driving greater adoption of parenteral nutrition among individuals with chronic conditions.

Threat:

High cost of parenteral nutrition

The high cost of parenteral nutrition (PN) poses a significant barrier to its widespread adoption, particularly for patients without adequate insurance coverage. The expensive nature of the treatments, including specialized formulas, equipment, and healthcare support, can lead to financial strain on patients and healthcare systems. This can result in delayed treatments or limited access, especially in low-income populations, ultimately affecting patient outcomes and increasing healthcare disparities.

Covid-19 Impact:

The COVID-19 pandemic had a profound impact on the market, increasing demand due to the rise in severe malnutrition and gastrointestinal complications among COVID-19 patients. The healthcare system's focus on critical care further heightened the need for home-based PN as hospitals were overwhelmed. However, disruptions in supply chains and shortages of key ingredients initially affected availability. Despite these challenges, the pandemic accelerated the adoption of home healthcare solutions for long-term nutritional support.

The amino acids segment is expected to be the largest during the forecast period

The amino acids segment is expected to account for the largest market share during the forecast period as they are essential building blocks for protein synthesis and overall body function. In formulations, amino acids are provided intravenously to support patients who cannot absorb nutrients orally. Customized amino acid solutions are tailored to meet the specific needs of individuals, especially those with chronic conditions, ensuring proper recovery, maintaining muscle mass, and preventing malnutrition.

The hospitals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the hospitals segment is predicted to witness the highest growth rate as they are primary settings for administering to patients with severe malnutrition, gastrointestinal disorders, or recovery from surgeries. Hospitals use specialized formulations to meet the nutritional needs of critically ill patients who cannot absorb nutrients orally. The demand in hospitals continues to grow due to the increasing prevalence of chronic diseases and complex medical conditions requiring nutritional support.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share driven by the rising prevalence of chronic diseases, an aging population, and increasing demand for home healthcare solutions. The region's advanced healthcare infrastructure, along with innovations in PN formulations and delivery methods, further fuels market expansion. Additionally, strong reimbursement policies and a focus on improving patient outcomes are contributing to the growing adoption in

the region.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. There is growing awareness of parenteral nutrition in the healthcare community, with better diagnostic tools and a rising understanding of the importance of nutrition in managing various medical conditions. Additionally, several governments in the region are focusing on improving healthcare access and nutrition, especially in developing countries. This creates a conducive environment for the growth of the market.

Key players in the market

Some of the key players in Parenteral Nutrition market include AbbVie Inc., Baxter International Inc., Merck & Co., Danone Nutricia, Medi Pharma, Eli Lilly and Company, Aptalis Pharma, Sodium Bicarbonate LLC, Biomarin Pharmaceutical, B. Braun Melsungen AG, Smith & Nephew, Roche Holding AG, Novartis International AG, Medtronic and Orion Corporation.

Key Developments:

In June 2024, AbbVie and FutureGen Biopharmaceutical (Beijing) Co., Ltd. announced a license agreement to develop FG-M701, a next generation TL1A antibody for the treatment of IBD currently in preclinical development.

In May 2024, Baxter International Inc. (NYSE:BAX), a global leader in nutrition therapy, announced U.S. FDA approval of an expanded indication for Clinolipid (Lipid Injectable Emulsion) to be used in pediatric patients, including preterm and term neonates.

Product Types Covered:

Total Parenteral Nutrition (TPN)

Partial Parenteral Nutrition (PPN)

Nutrient Types Covered:

Amino Acids

Carbohydrates

Lipids

Vitamins & Minerals

Trace Elements

Route of Administrations Covered:

Central Parenteral Nutrition (CPN)

Peripheral Parenteral Nutrition (PPN)

Applications Covered:

Cancer

Gastrointestinal Disorders

Neurological Disorders

Critical Care

Pediatrics/Neonates

Liver Disease

Other Applications

End Users Covered:

Hospitals

Homecare

Long-Term Care Facilities

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends

- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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