

# **Medical Nutrition Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Route of Administration (Oral and Enteral, Parenteral), By Application (Malnutrition, Metabolic Disorders, Gastrointestinal Diseases, Cancer, Neurological Diseases, Others), By End User (Pediatric, Adult), By Region, and By Competition**

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### **Abstracts**

Global Medical Nutrition Market is anticipated to project impressive growth in the forecast period. The global medical nutrition market encompasses a diverse range of specialized nutritional products and supplements designed to address specific medical conditions and nutritional needs. These products are utilized by individuals who require tailored nutrition solutions due to various health issues, including malnutrition, chronic diseases, gastrointestinal disorders, and more.

#### **Key Market Drivers**

##### **Rising Health Awareness**

In recent years, a notable shift has occurred in how people perceive health and wellness. There is an increasing awareness of the profound connection between nutrition and well-being, which has significantly contributed to the growth of the global medical nutrition market. This heightened health consciousness is driving individuals to seek specialized nutrition solutions, making the medical nutrition market a dynamic and rapidly expanding industry.

Rising health awareness has prompted a paradigm shift from reactive healthcare to

proactive health management. Individuals are increasingly taking charge of their well-being by adopting healthier lifestyles and actively seeking ways to prevent health issues. Medical nutrition plays a crucial role in this shift, offering a means to prevent and manage health conditions through tailored dietary interventions.

As people become more educated about the profound impact of nutrition on overall health, they are more likely to explore dietary changes and nutritional supplementation. Medical nutrition products, which are specially formulated to address specific health needs, are seen as powerful tools for improving health outcomes. Conditions like malnutrition, chronic diseases, gastrointestinal disorders, and more can be positively influenced through the use of these products.

Rising health awareness leads to a growing demand for specialized nutritional products. Individuals are becoming more discerning in their choice of food and supplements, looking for options that align with their health goals. This surge in demand drives manufacturers to innovate and offer a broader range of medical nutrition products to meet the diverse needs of consumers.

Health-conscious individuals are increasingly turning to healthcare professionals for guidance on nutrition. This collaboration between patients and healthcare providers has created a channel for recommending and prescribing medical nutrition products. Physicians, dietitians, and other healthcare experts are better equipped to identify the specific nutritional needs of their patients, leading to an increased utilization of medical nutrition products.

The advent of e-commerce and online shopping has made medical nutrition products more accessible to consumers. People can conveniently browse through a variety of products, compare options, and make informed choices. The ease of online purchasing has broadened the market's reach, making specialized nutrition products available to a wider audience.

Manufacturers in the medical nutrition industry are diversifying their product lines to cater to the growing health-conscious consumer base. This diversification includes the development of more palatable and convenient options, such as tasty meal replacement shakes and convenient dietary supplements. These innovations make it easier for individuals to incorporate medical nutrition products into their daily routines.

As health awareness increases, consumers and healthcare professionals expect high standards of safety and efficacy in medical nutrition products. Regulatory authorities,

such as the FDA in the United States, have implemented stringent quality standards. This assures consumers that the products they choose are of the highest quality, further boosting the credibility and growth of the market.

### Chronic Diseases Epidemic

The global medical nutrition market is witnessing significant expansion, and one of the prominent factors driving this growth is the escalating epidemic of chronic diseases. Chronic diseases, including diabetes, cardiovascular diseases, obesity, cancer, and more, are increasingly prevalent worldwide. This rising health crisis has not only heightened awareness of the critical role of nutrition in disease management but also catalyzed the demand for specialized nutritional interventions.

The surge in chronic diseases is a global concern. Lifestyle factors, including poor dietary choices, sedentary behavior, and stress, have contributed to the increasing incidence of conditions like type 2 diabetes, heart disease, and certain types of cancer. As the number of individuals affected by these ailments continues to rise, there is a growing need for comprehensive management strategies.

Nutrition plays a pivotal role in the prevention and management of chronic diseases. A balanced diet, rich in essential nutrients, can help control blood sugar levels, reduce the risk of heart disease, and aid in weight management. Individuals diagnosed with chronic conditions are often required to make specific dietary changes to improve their health outcomes.

The global medical nutrition market offers a wide range of specialized products designed to address the unique dietary requirements of individuals with chronic diseases. These products are formulated with precision, considering the specific nutritional needs and dietary restrictions of patients. This tailoring is instrumental in helping individuals manage their conditions more effectively.

Manufacturers in the medical nutrition industry are developing an array of products tailored to specific chronic diseases. For instance, there are nutritionally complete shakes for individuals with diabetes, heart-healthy dietary supplements, and products for cancer patients experiencing weight loss and malnutrition. These disease-targeted nutritional solutions cater to the needs of a diverse patient population.

Healthcare providers, including physicians, dietitians, and nurses, recognize the significance of nutrition in chronic disease management. They play a crucial role in

prescribing and recommending medical nutrition products to their patients. This collaboration between healthcare professionals and patients not only boosts product utilization but also enhances the credibility of medical nutrition in the healthcare ecosystem.

As the understanding of nutrition's impact on chronic diseases deepens, dietary guidelines are evolving. Healthcare organizations and government agencies are emphasizing the role of nutrition in disease management. This has a ripple effect, influencing both healthcare professionals and patients to consider medical nutrition as an integral part of disease management.

The increasing prevalence of chronic diseases has spurred research and development efforts in the medical nutrition industry. Manufacturers are constantly innovating, formulating products with enhanced nutritional profiles and better taste to cater to the evolving needs of patients. This innovation helps individuals better adhere to their dietary recommendations.

### Customized Nutrition Solutions

The global medical nutrition market is experiencing a significant upswing in growth, and a key driver behind this expansion is the increasing demand for customized nutrition solutions. These specialized products are tailored to meet the unique dietary needs of individuals facing a wide range of health challenges, ranging from malnutrition to chronic diseases. The marriage of personalized nutrition with healthcare is transforming the landscape and fueling market growth.

The concept of personalized nutrition revolves around the idea that one size does not fit all when it comes to dietary needs. Factors such as age, gender, medical conditions, and genetic predispositions can all impact an individual's nutritional requirements. Customized nutrition aims to deliver precisely what the body needs, optimizing health outcomes.

Many individuals today are dealing with health conditions that necessitate specific dietary adjustments. Whether it's a cancer patient undergoing treatment, a diabetic individual managing blood sugar levels, or someone with food allergies, customized nutrition solutions are becoming indispensable for improving their quality of life.

Customized nutrition solutions address the individualized dietary needs of patients. These products are formulated to provide the exact nutrients, vitamins, and minerals

necessary to support health and well-being, all while considering any dietary restrictions or sensitivities.

Customized nutrition often involves a collaborative approach with healthcare professionals. Physicians, dietitians, and nutritionists play a vital role in assessing an individual's health status and recommending the most appropriate medical nutrition products. This partnership between patients and healthcare providers enhances the credibility of these solutions.

The global medical nutrition market has responded to the demand for customized solutions by diversifying its product portfolio. Today, there are a variety of offerings, including enteral nutrition, parenteral nutrition, dietary supplements, and functional foods. This diversity ensures that there is a product tailored to virtually every need, expanding the market's reach.

The increasing popularity of customized nutrition has spurred innovation within the industry. Manufacturers are investing in research and development to create products that are not only nutritionally sound but also palatable and convenient. This innovation is essential for improving patient compliance and satisfaction.

Stringent regulations and quality standards, such as those enforced by the FDA and other regulatory bodies, are crucial for ensuring the safety and efficacy of medical nutrition products. Patients and healthcare professionals alike can have confidence in the quality and reliability of these specialized nutrition solutions.

## E-commerce Revolution

The global medical nutrition market is experiencing remarkable growth, and one of the key drivers behind this expansion is the transformative influence of e-commerce and modern distribution channels. As technology continues to reshape the way clients shop and access healthcare products, the medical nutrition industry has seized the opportunity to make its products more accessible and convenient to a broader audience.

E-commerce platforms offer unparalleled convenience for consumers. Individuals seeking medical nutrition products can browse a vast selection, compare options, and make purchases from the comfort of their homes. This accessibility removes geographical barriers and allows individuals in remote areas to access these products without the need for a physical store.

E-commerce platforms provide a diverse array of medical nutrition products, from dietary supplements and enteral nutrition to functional foods. This broad range caters to various health conditions and dietary preferences, ensuring there's a product for everyone.

Online platforms provide detailed product information and user reviews, allowing consumers to make informed decisions. Patients and caregivers can research and compare different medical nutrition products, helping them choose the most suitable options for their specific needs.

Medical conditions can be sensitive topics, and some individuals may prefer to maintain privacy when purchasing medical nutrition products. E-commerce platforms offer discreet shopping experiences, allowing customers to order products without the need for in-person interactions.

E-commerce transcends geographical boundaries, making medical nutrition products accessible to consumers worldwide. This expanded market reach allows manufacturers to tap into a more extensive and diverse customer base, further fueling market growth.

The digital marketplace fosters healthy competition among manufacturers and suppliers. To stand out in the crowded online space, companies are incentivized to innovate, creating new and improved medical nutrition products. This environment benefits consumers by offering a broader selection of high-quality options.

Modern distribution channels, including e-commerce, have revolutionized supply chain logistics. These innovations streamline the process of getting medical nutrition products from manufacturers to consumers, reducing costs and improving product availability.

## Key Market Challenges

### Stringent Quality Assurance

Quality assurance is paramount in the medical nutrition market. Ensuring the safety and efficacy of these products is a complex process, with strict standards set by regulatory agencies such as the U.S. Food and Drug Administration (FDA) and the European Food Safety Authority (EFSA). Adherence to these standards is essential to maintain consumer trust, which can be a challenge for smaller manufacturers and new entrants in the market.

## Changing Healthcare Landscape

The global healthcare landscape is constantly evolving. With the advent of telemedicine, increased focus on preventive care, and shifts in healthcare reimbursement models, the way medical nutrition products are prescribed and integrated into patient care is changing. This dynamic environment can be challenging to navigate, requiring manufacturers and healthcare professionals to adapt to new models of healthcare delivery.

## Evolving Dietary Guidelines

Dietary guidelines and recommendations are constantly evolving based on new research and scientific findings. Manufacturers must stay up to date with these changes and adjust their product formulations and marketing strategies accordingly. Ensuring that medical nutrition products align with the latest dietary guidelines can be a continuous challenge.

## Key Market Trends

### Personalized Nutrition

Personalization is a dominant trend across the food and nutrition industry, and medical nutrition is no exception. The future of medical nutrition is increasingly individualized, with tailored solutions that account for a person's unique health status, dietary preferences, and genetics. This trend is enabled by the growing understanding of nutrigenomics, which explores how an individual's genes interact with their diet, allowing for precision nutrition recommendations.

### Sustainable and Plant-Based Options

Sustainability and environmental concerns are influencing product choices in the medical nutrition market. More consumers are seeking plant-based, sustainable, and environmentally friendly options. As a result, manufacturers are developing products that cater to this demand, such as plant-based protein shakes and supplements that have a lower ecological footprint.

### Inclusion of Functional Foods

Functional foods, which are fortified with added health benefits, are gaining popularity in the medical nutrition market. These foods offer a convenient and enjoyable way for individuals to meet their specific dietary needs. Examples include fortified yogurt for digestive health and fortified cereals for cardiovascular health.

## Segmental Insights

### Route of Administration Insights

Based on the category of Route of Administration, it is anticipated that the Oral and Enteral Segment will maintain a significant market share throughout the projected period. Among the various methods of clinical nutrition administration, oral and enteral routes are the most frequently utilized, with parenteral administration being a less preferred alternative due to its higher associated processing costs. Physicians typically favor the oral route for its simplicity and cost-effectiveness, especially when compared to the other two administration methods.

Enteral therapy involves specialized liquid feedings that contain essential nutrients like protein, carbohydrates, fats, vitamins, and minerals required for sustaining life. These nutritional support products are custom-formulated to meet individual needs, catering to a range of disease states and conditions. Additionally, the majority of conditions for which oral administration of clinical nutrition is employed are chronic or non-acute in nature.

For example, in cases of end-stage renal disease (ESRD), patients face limited treatment options, such as organ transplantation (which may not always be feasible due to donor availability issues, and even when a donor is found, the process can take several months to years) or regular hemodialysis. Specialized clinical nutrition delivered through oral and enteral feeding is prescribed to alleviate the strain on the kidneys, helping control the production of waste products like creatinine, uric acid, and bilirubin.

Market growth is further spurred by initiatives undertaken by key industry players. An illustrative instance is the partnership between NutiFood and BASF in April 2021, where NutiFood, as the first Vietnamese dairy company, collaborated with a European corporation to introduce Human Milk Oligosaccharides (HMO) products into its nutrition product lineup. These products are designed for consumption through oral ingestion.

## Application Insights



Based on Application, Cancer is anticipated to exert a dominant influence on the Global Medical Nutrition Market throughout the forecast period for several compelling reasons. Firstly, the incidence of cancer cases continues to rise globally, making it one of the most prevalent and serious health challenges. As a result, the demand for specialized medical nutrition products that can support cancer patients during their treatment and recovery is expected to grow significantly. Additionally, advancements in medical nutrition research and innovation are yielding more effective and targeted nutritional solutions for cancer patients, further fueling market growth. Furthermore, as the aging population expands, the likelihood of cancer diagnosis increases, and this demographic trend is expected to drive the demand for medical nutrition products tailored to the specific needs of elderly cancer patients. With an array of factors converging to shape this scenario, cancer is poised to play a dominant role in shaping the dynamics of the Global Medical Nutrition Market in the coming years.

### Regional Insights

In the Clinical Nutrition Market, North America holds a substantial share and is expected to continue this trend over the forecast period. North America's contribution to market growth surpasses that of other regions. The emergence of the COVID-19 pandemic has caused shortages in clinical nutritional products within this region. According to data from the American Society for Parenteral and Enteral Nutrition (ASPEN) as of January 2021, there are shortages of certain parenteral products, including adult and pediatric multi-vitamin infusion, amino acids, potassium acetate injection, USP, sodium acetate injection, USP, and sodium chloride, with a shortage rate of 23.4% for injections.

To meet the changing demands driven by shifts in consumer buying behavior due to the COVID-19 pandemic, manufacturers have increased production and are collaborating with retailers and government agencies to ensure the continued availability of oral clinical nutrition products. Several key factors contribute to the growth of the clinical nutrition market, including the increasing prevalence of metabolic disorders. For instance, as reported in a government of Canada press release in August 2021, diabetes is a significant chronic disease affecting Canadians, with over 3 million Canadians, or 8.8% of the population, diagnosed with diabetes, and 6.1% of Canadian adults being at high risk of developing diabetes as of August 2021. These conditions necessitate long-term clinical nutritional support, making diseases like diabetes a key driver of market growth in the forecast period.

### Key Market Players

Abbott Nutrition Ltd

Nestle Health Science SA

Baxter Healthcare Corp

B Braun SE

Danone SA

Perrigo Co PLC

Fresenius Kabi AG

AYMES Nutrition

Reckitt Benckiser Group PLC

Ajinomoto Cambrooke Inc.

Report Scope:

In this report, the Global Medical Nutrition Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Medical Nutrition Market, By Route of Administration:

Oral and Enteral

Parenteral

Medical Nutrition Market, By Application:

Malnutrition

Metabolic Disorders

Gastrointestinal Diseases

Cancer

Neurological Diseases

Others

Medical Nutrition Market, By End User:

Pediatric

Adult

Medical Nutrition Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Medical Nutrition Market.

## Available Customizations:

Global Medical Nutrition market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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