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North America Enteral and Parenteral Medical Nutrition Market Forecast to 2028 - Regional Analysis By Indication [Elderly, Gastrointestinal Disorders (IBD, IBS, and Others), Diabetes, Cancer, Respiratory Disorders, Alzheimer's Disease, Dementia, Renal Disease, Liver Failure, Post COVID-19, and Other Indications], Nutrition Type (Supplemental and Sole Source), Form (Liquid, Powder, and Semi Solid), Product Type (General and Disease Specific), Route of Administration (Oral, Tube Feed, and Parenteral), Age Group (Above 60 Years, 18-60 Years, 3-18 Years, and Below 3 Years), and Distribution Channel (Hospital Pharmacies, Retail Stores, E-Commerce, and Others)

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Abstracts

The North America enteral and parenteral medical nutrition market is expected to grow from US$ 8,049.98 million in 2023 to US$ 11,030.78 million by 2028. It is estimated to grow at a CAGR of 6.5% from 2023 to 2028.

Rise in Prevalence of Gastrointestinal Diseases Fuels North America Enteral and Parenteral Medical Nutrition Market

Crohn's disease, bowel obstruction, ulcerative colitis, short bowel syndrome, microscopic colitis, and certain cancers are a few examples of gastrointestinal diseases.

Based on the Global Burden of Disease Study 2019, ~4.9 million cases of inflammatory bowel disease (IBD) were recorded worldwide in 2019; China (911,405) and the US (762,890) had the highest number of cases, with prevalence of 66.9 and 245.3 cases per 100,000 people, respectively. Crohn’s disease and ulcerative colitis are two of the commonly diagnosed IBDs. Crohn’s disease is a complex, chronic disorder primarily affecting the digestive system. It is the most common disease in North America. Moreover, short bowel syndrome (SBS) occurs in ~3 per 1 million people yearly. As per the article titled “Understanding Short Bowel Syndrome: Current Status and Future Perspectives,' published in 2020, the prevalence of SBS has increased by more than twofold in the last 40 years. The prevalence was ~30 cases per million in the US.

Patients with gastrointestinal diseases are at an elevated risk of nutritional deterioration as they are asked to fast before undergoing diagnostic tests. They may also face nutritional deterioration due to therapeutic dietary restriction and loss of appetite caused by anorexia or altered nutritional requirement, which can be a result of the disease itself. Thus, medical nutrition is recommended for gastrointestinal disease patients as these patients cannot ingest food. Thus, the enteral and parenteral routes are preferred to provide them with essential nutrients. Enteral feeding refers to food nutrition intake directly through the mouth or through a tube that passes the digestive tract (mouth to stomach/small intestine and then anus). This type of nutrition is preferred to provide treatment support for patients suffering from chronic ailments, such as neurological disorders, gastrointestinal diseases, and inherited metabolic diseases. Some people may not show compatibility toward tube insertion, which makes meeting their calorie and nutrient needs difficult. In such cases, parenteral nutrition is preferred to ensure their bodies remain hydrated and meet the calorie and other nutrient intake required to maintain physical well-being and function. Parenteral nutrition is indicated when patients cannot meet their nutritional needs due to diseases, such as cancer and chronic diseases affecting the gastrointestinal tract. This type of nutrition is the cornerstone of therapy for most patients with severe SBS. Therefore, the elevating prevalence of gastrointestinal diseases drives the growth of the North America enteral and parenteral medical nutrition market.

North America Enteral and Parenteral Medical Nutrition Market Overview

The enteral and parenteral medical nutrition market in North America has been segmented into the US and Canada. The US held a larger share of the market in 2022. The rising prevalence of chronic diseases, growing strategic developments by market players, and increasing preference for enteral and parenteral nutrition contribute to the market progress in this region. Moreover, an upsurge in knowledge among individuals about the benefits of medical nutrition, such as tube feeding, in the treatment of chronic health conditions further contributes to the market growth.

North America Enteral and Parenteral Medical Nutrition Market Revenue and Forecast to 2028 (US$ Million)

North America Enteral and Parenteral Medical Nutrition Market Segmentation

The North America enteral and parenteral medical nutrition market is segmented into indication, nutrition type, form, product type, route of administration, age group, and distribution channel, and country.

Based on indication, the North America enteral and parenteral medical nutrition market is segmented into elderly, gastrointestinal disorders, diabetes, cancer, respiratory disorders, alzheimer's disease, dementia, renal disease, liver failure, post covid-19, and other indications. The elderly segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023. Gastrointestinal disorders are segmented into IBD, IBS, and others.

Based on nutrition type, the North America enteral and parenteral medical nutrition market is segmented into supplemental and sole source. The supplemental segment held a larger share of the North America enteral and parenteral medical nutrition market in 2023.

Based on form, the North America enteral and parenteral medical nutrition market is segmented into liquid, powder, and semi solid. The liquid segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023.

Based on product type, the North America enteral and parenteral medical nutrition market is segmented into general and disease specific. The general segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023.

Based on route of administration, the North America enteral and parenteral medical nutrition market is segmented into oral, tube feed, and parenteral. The parenteral segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023.

Based on age group, the North America enteral and parenteral medical nutrition market is segmented into above 60 years, 18-60 years, 3-18 years, and below 3 years. The above 60 years segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023.

Based on distribution channel, the North America enteral and parenteral medical nutrition market is segmented into a hospital pharmacies, retail stores, e-commerce, and others. The hospital pharmacies segment held the largest share of the North America enteral and parenteral medical nutrition market in 2023

Based on country, the North America enteral and parenteral medical nutrition market is segmented into the US and Canada. The US dominated the share of the North America enteral and parenteral medical nutrition market in 2023.

Abbott Laboratories; B. Braun SE; Baxter International Inc; Fresenius Kabi AG; Medica Nutrition Inc; Medtrition Inc; Nestle SA; Nutricia International BV; and Nutrisens SAS are some of the leading companies operating in the North America enteral and parenteral medical nutrition market.

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