

Global Enteral Feeding Formulas - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

Market Report | 2024-02-17 | 153 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Global Enteral Feeding Formulas Market size is estimated at USD 8.77 billion in 2024, and is expected to reach USD 11.30 billion by 2029, growing at a CAGR of 5.18% during the forecast period (2024-2029).

The outbreak of COVID-19 is expected to impact the enteral feeding formulas market, as good supportive care remains the cornerstone in managing critically ill patients with COVID-19 infection, within which nutritional management of the ICU admitted COVID-19 patients is an integral component of the supportive measures. For instance, according to the study published in Nutrients in March 2022, to prevent malnutrition in COVID-19 individuals, prompt enteral nutrition support and the administration of adequate nutrients were crucial. Additionally, it is advised for critically ill patients for enteral feeding assistance. Such instances might have been expected to drive the market during the pandemic. Furthermore, post-pandemic, there has been an increased demand for these formulas due rise in enteral feeding formulas, a rise in the prevalence of diseases, and a rise in the number of hospitals, among others.

The enteral feeding formula market is primarily driven by the increasing prevalence of metabolic and chronic disorders, increased expenditure on patient care, and the growing geriatric population. According to the IDF 2021, approximately 537 million adults are living with diabetes, and the number of people adults living with diabetes is projected to rise to 643 million by 2030 and 783 million by 2045. Such a rise in metabolic diseases is expected to drive market growth due to a rise in the adoption of enteral feeds for diabetic patients, as diabetes-specific nutrition formulas (DSNFs) can help control the development, progression, and severity of certain chronic diseases.

Also, aging is the primary factor driving the market growth for the treatment. According to the United Nations Department of Economics and Social 2022 report, there were 771 million people aged 65 years or over globally in 2022, and the older population

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

is projected to reach 994 million by 2030 and 1.6 billion by 2050. Thus, the demand for enteral nutrition will rise with the growing geriatric population due to the increased adoption of enteral feeding formulas in the elderly. Furthermore, the rising healthcare expenditure in developed and developing countries and the increasing demand for home healthcare services will also boost the enteral feeding formula market growth.

Furthermore, the rise in initiatives from the key market players for the launch of their products is expected to drive market growth. For instance, in May 2022, Abbott decided to release EleCare specialty amino acid-based formulas in infants and children who have severe food allergies or gastrointestinal (GI) disorders. Such instances are also expected to drive market growth due to the rise in adoption in pediatrics.

However, complications associated with enteral nutrition and high cost and low adherence rates in developing countries are the factors expected to impede market growth.

Enteral Feeding Formulas Market Trends

Oncology Segment is Expected to Hold a Significant Market Share in the Enteral Feeding Formulas Market

Most cancer patients suffer from cancer cachexia, which causes insulin resistance, increased lipolysis with loss of body fat, increased protein turnover, and loss of muscle mass, causing loss of appetite and weight. This requires enteral feeding formulas in cancer patients, driving this segment's growth.

The rising support and awareness from the key market players on the nutrition of cancer patients are expected to drive this segment's growth due to the rise in the adoption of enteral feeding formulas in cancer patients. For instance, in December 2021, Nestle Health Science created a website in collaboration with healthcare professionals to offer information and support at every phase of the disease. The company emphasized the value of nutrition as part of a new initiative to inform and support cancer patients and their caregivers.

According to the study published in Nature in July 2022, it was found that the impact of preoperative oral nutrition supplementation (ONS) on patients undergoing gastrointestinal cancer surgery has reduced all-cause postoperative surgical complications and mortalities. Therefore, the high importance of nutritional supplementation in cancer patients is anticipated to increase the demand for enteral feeding formulas, driving this segment growth.

Furthermore, to improve the clinical condition of cancer patients, providing nutrition is the cornerstone, as it becomes tough for cancer patients to take food orally. As the treatment proceeds, nutrition is supplied by enteral feeding tubes to enable them to maintain body mass.

Therefore, owing to the above-mentioned factors, this segment is expected to show significant growth over the forecast period.

The below graph represents the funding for cancer treatments by the National Institute of Health in the United States. The rising funding for cancer treatments in developed regions such as the United States will help in the development of enteral feeding formulas, driving segment growth.

North America is Expected to hold a Major Share in the Market Studied Over the Forecast Period

North America is expected to dominate the enteral feeding formulas market because of the factors such as the rapidly aging population, the surging prevalence of preterm birth, and the rise in the number of chronic disease patients. According to the Rural Health Information Hub 2022, in the United States, there are more than 46 million older adults who are 65 or older in 2022, and by

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2050, that figure is projected to reach nearly 90 million. The rising incidence of the geriatric population is expected to drive this segment's growth due to the rise in the adoption of enteral feeding formulas in this age group.

The rise in the geriatric population will increase the cases of chronic diseases, such as cancer and diabetes, which will further lead to an increase in the patient's hospital stays. According to the American Cancer Society, in 2022, the estimated number of new cancer cases diagnosed is 1.9 million. Such a high incidence of cancer cases in the United States is expected to propel the market growth in this region due to the rise in the adoption of enteral feeding formulas in these patients.

Furthermore, the rise in the launch of innovative enteral feeding formulas by the key market players in this region is expected to drive market growth over the forecast period. For instance, in August 2021, Kate Farms launched the closed feeding system delivering plant-based formulas in a ready-to-hang 1-liter bag. This closed-system packaging makes clinically proven, plant-based nutrition available to patients requiring tube feeding in acute care settings. Such initiatives are expected to bolster the market growth in this region.

Therefore, the rise in the prevalence of chronic diseases, the strong foothold of key market players, and the rise in the launch of products, among others, are expected to drive market growth in this region.

Enteral Feeding Formulas Industry Overview

The enteral feeding formula market is moderately fragmented. The market is expected to drive due to the rise in the launch of products and the rise in the prevalence of diseases, among others. The key market players include Abbott Laboratories, Nestle SA, Danone SA, Fresenius Kabi AG, B. Braun Melsungen AG, and Reckitt Benckiser Group plc. (Mead Johnson), Global Health Product Inc., Meiji Holdings Co. Ltd, and Victus, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Increasing Prevalence of Metabolic and Chronic Diseases
 - 4.2.2 Increasing Spending on Patient Care
 - 4.2.3 Growing Geriatric Population
- 4.3 Market Restraints
 - 4.3.1 Complications Associated with Enteral Nutrition
 - 4.3.2 High Cost and Low Adherence Rates in Developing Countries

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.4 Porter Five Forces
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Product
 - 5.1.1 Standard Formulas
 - 5.1.2 Disease-specific Formulas
- 5.2 By Application
 - 5.2.1 Oncology
 - 5.2.2 Neurology
 - 5.2.3 Critical Care
 - 5.2.4 Diabetes
 - 5.2.5 Gastroenterology
 - 5.2.6 Other Applications
- 5.3 By End User
 - 5.3.1 Hospital
 - 5.3.2 Home Care Agencies and Hospices
 - 5.3.3 Other End Users
- 5.4 By Distributuion Channel
 - 5.4.1 Hospitals
 - 5.4.2 Retail Pharmacies
 - 5.4.3 Online Pharmacies
- 5.5 Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Italy
 - 5.5.2.5 Spain
 - 5.5.2.6 Rest of Europe
 - 5.5.3 Asia-Pacific
 - 5.5.3.1 China
 - 5.5.3.2 Japan
 - 5.5.3.3 India
 - 5.5.3.4 Australia
 - 5.5.3.5 South Korea
 - 5.5.3.6 Rest of Asia-Pacific
 - 5.5.4 Middle East and Africa
 - 5.5.4.1 GCC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.5.4.2 South Africa
- 5.5.4.3 Rest of Middle East and Africa
- 5.5.5 South America
 - 5.5.5.1 Brazil
 - 5.5.5.2 Argentina
 - 5.5.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Abbott Laboratories
 - 6.1.2 B. Braun Melsungen AG
 - 6.1.3 Danone SA (Nutricia)
 - 6.1.4 Fresenius SE & Co. KgaA (Fresenius Kabi AG)
 - 6.1.5 Global Health Product Inc.
 - 6.1.6 Reckitt Benckiser Group plc. (Mead Johnson)
 - 6.1.7 Meiji Holdings Co. Ltd
 - 6.1.8 Nestle SA
 - 6.1.9 Kate Farms
 - 6.1.10 Victus Inc.
 - 6.1.11 Hormel Foods Corporation
 - 6.1.12 Functional Formularies

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Global Enteral Feeding Formulas - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

Market Report | 2024-02-17 | 153 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-06
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com