

Medical Nutrition - A Global Market Overview

Market Report | 2025-02-11 | 210 pages | Industry Experts

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Report description:

Global Medical Nutrition Market Trends and Outlook

Medical nutrition encompasses specialized products designed to meet the dietary requirements of patients suffering from chronic diseases or particular health conditions. Medical nutrition includes therapeutic nutritional supplements, enteral and parenteral nutrition, and medical foods, all used under medical supervision. Such nutritional interventions are frequently used along with conventional treatments to assist patients who are unable to fulfill their nutritional needs through standard dietary intake due to conditions such as cancer, diabetes, gastrointestinal diseases, and malnutrition. The medical nutrition market comprises various segments, including enteral nutrition for individuals unable to consume food orally, parenteral nutrition for those incapable of digesting food, and infant nutrition. These products play a vital role in various applications, including cancer care, metabolic disorders management, and treatment of gastrointestinal diseases, with the primary objective of enhancing patient outcomes, facilitating recovery, and improving overall quality of life. Medical nutrition utilizes dietary modification, tube feeding, and intravenous nutrition to support overall health, particularly for pediatric and geriatric populations.

The global Medical Nutrition market size is estimated at US\$59.7 billion in 2024 and is projected to reach US\$89.6 billion by 2030, with a CAGR of 7% during the forecast period 2024-2030. The global medical nutrition market is fueled by several significant factors. An increase in the prevalence of chronic diseases, including diabetes, cardiovascular diseases, and cancer, is driving the demand for specialized medical nutrition aimed at managing and preventing these conditions. The growing geriatric population, associated health challenges, and specific nutritional requirements, particularly among elderly individuals facing poor nutrient absorption and metabolic disorders, further propel market growth.

Additionally, increased consumer awareness regarding the essential role of nutrition in health management, alongside advancements in personalized nutrition and medical nutrition therapy, is fueling demand. The rising rates of obesity and metabolic disorders, combined with evolving dietary patterns and lifestyle habits, are also contributing to the market's expansion. The acknowledgment by healthcare professionals of nutrition's significance in disease management and prevention is resulting in increased nutritional interventions in clinical settings. Furthermore, innovations in technology, such as nutrigenomics and wearable health devices, are empowering individuals to adopt personalized nutrition solutions. The growing emphasis on functional foods, fortified beverages, and a transition towards healthier eating habits is anticipated to sustain the market's growth in the coming years.

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Medical Nutrition Regional Market Analysis

North America maintains a significant presence in the global medical nutrition market, representing 34.6% of the market share in 2024. This dominance is primarily attributed to an aging population that is increasingly susceptible to chronic diseases, including gastrointestinal, metabolic, and neurological disorders. The region's elevated incidence of cancer and metabolic health issues further enhances the demand for medical nutrition. Conversely, the Asia-Pacific region is anticipated to record the fastest growth with a CAGR of 8.7% during the analysis period 2024-2030, driven by a rise in inflammatory bowel disease, gastrointestinal disorders, and chronic conditions such as cancer and diabetes, alongside an increase in life expectancy. Factors such as rapid urbanization, lifestyle transformations, improved income levels, and enhanced access to healthcare are contributing to the rising demand for medical nutrition in this region.

Medical Nutrition Market Analysis by Product

Infant nutrition represents the largest segment in the medical nutrition market, accounting for an estimated 46.3% share in 2024 due to increasing recognition of the significance of early childhood nutrition and rising demand for specialized infant formula. Additionally, the segment dominance is further strengthened by the increasing incidence of pre-term births and medical conditions affecting infants. In contrast, enteral nutrition is the fastest-growing segment, with a projected CAGR of 7.8% from 2024 to 2030. This segment's growth is driven by its extensive application among patients with chronic illnesses, disabilities, and conditions that hinder the ability to consume food orally. Moreover, advancements in enteral feeding systems and a growing aging population play a significant role in its growth.

Enteral Nutrition Market Analysis by Type

Standardized enteral nutrition is projected to dominate the enteral nutrition market with an estimated 43.3% share in 2024, driven by its widespread use in hospitals and clinics, offering essential nutrients in a convenient, ready-to-use format. Its cost-effectiveness and ease of administration make it the preferred option for numerous healthcare providers. Meanwhile, specialized enteral nutrition is projected as the fastest-growing segment, with a CAGR of 8.7% from 2024 to 2030. This growth is fueled by the increasing demand for personalized nutrition solutions, particularly for patients with cancer, neurological disorders, and metabolic diseases. The increased emphasis on targeted therapies and medical nutrition further contributes to the rapid expansion of this segment.

Medical Nutrition Market Analysis by Application

Cancer is the largest application segment in the medical nutrition market, holding a 29.2% share in 2024, driven by the critical nutritional needs of patients during treatment. Cancer therapies like chemotherapy often cause malnutrition due to reduced appetite, side effects, and metabolic changes, highlighting the need for specialized nutrition to improve outcomes. Proper nutrition supports immunity, manages malnutrition, and enhances treatment effectiveness. The rising occurrence of cancer and heightened awareness of the recovery benefits offered by medical foods are driving the market growth. On the other hand, the gastrointestinal diseases segment is expected to experience the fastest CAGR of 8.4% during the 2024-2030 analysis period, fueled by the rising incidence of conditions such as Crohn's disease, ulcerative colitis, and irritable bowel syndrome, as well as increased awareness of the importance of nutrition in managing these disorders.

Medical Nutrition Market Report Scope

This global report on Medical Nutrition analyzes the market based on product, sub-type, and application for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

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Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

Medical Nutrition Market by Geographic Region

- North America (The United States, Canada, and Mexico)
- Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)
- Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)
- South America (Brazil, Argentina, and Rest of South America)
- Rest of World

Medical Nutrition Market by Product

- Infant Nutrition
- Enteral Nutrition
 - o□Standardized Enteral Nutrition
 - o□Elemental/Semi-Elemental Enteral Nutrition
 - o□Specialized Enteral Nutrition
- Parenteral Nutrition

Medical Nutrition Market by Application

- Cancer
- Malnutrition
- Gastrointestinal Diseases
- Metabolic Disorders
- Neurological Disorders
- Other Applications (Including Diabetes, Renal Disorders, Respiratory Diseases, Obesity Management, Immunological Support, and Others)

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- B. Braun Melsungen AG
- Baxter International Inc.
- Danone S.A.
- Fresenius Kabi AG
- ICU Medical, Inc.
- Kate Farms
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