

North America Clinical Nutrition - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 90 pages | Mordor Intelligence

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Report description:

North America Clinical Nutrition Market Analysis

The clinical nutrition market in North America is valued at USD 31.73 billion in 2025 and is projected to reach USD 42.84 billion by 2030, registering a 6.19% CAGR through the forecast period. Demographic aging, higher survival rates for chronic-disease patients, and telehealth adoption are the main growth catalysts. Remote dietitian consultations have expanded home enteral programs, while AI-based decision support is improving parenteral protocols. Regulatory modernization, such as the FDA's first full review of infant-formula nutrients since 1988, is encouraging product innovation. Supply-chain resilience also rebounded after 2023 shocks, helped by a 34% surge in fish-oil output that stabilized lipid raw-material costs, further supporting the clinical nutrition market.

North America Clinical Nutrition Market Trends and Insights

Increasing Prevalence of Chronic & Metabolic Disorders

The rise in diabetes, cardiovascular disease, and obesity is lifting baseline demand for medical nutrition therapy. Close to half of U.S. adults live with diet-related conditions requiring intensive dietary management. Specialized formulas designed for patients using GLP-1 medications address micronutrient depletion and lean-muscle loss risks, and companies are bundling these products with virtual coaching to improve adherence. Abbott and Nestle Health Science each introduced targeted lines in 2024, signaling deeper alignment between pharmaceutical and nutrition strategies. Hospitals now include nutrition screening in chronic-care

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pathways, acknowledging cost offsets from reduced readmissions. Consequently, the clinical nutrition market is seeing faster uptake of disease-specific enteral products in outpatient settings.

Growing Aging Population Across North America

Adults aged 65 and older are forecast to account for one-fifth of the U.S. population by 2030. Sarcopenia and dysphagia are common geriatric challenges, prompting demand for texture-modified, high-energy formulas. Ensure surpassed USD 3 billion in global sales in 2024 as older consumers increased discretionary spending on preventive nutrition. Nursing-home malnutrition prediction models can now identify at-risk residents with 90% accuracy, enabling earlier intervention. Economically, malnutrition among older adults costs the United States USD 51.3 billion each year, strengthening the case for reimbursable nutrition solutions. These trends create sustainable tailwinds for the clinical nutrition market.

Stringent Multi-Agency Regulatory Approvals

Manufacturers must navigate separate frameworks from the FDA, Health Canada, and COFEPRIS, each with unique dossiers and labeling rules. The FDA's sweeping infant-formula nutrient review adds complexity by updating quantitative targets for numerous micronutrients. Health Canada is simultaneously modernizing its special-diet regulations to close gaps exposed during the 2022 formula shortage. Divergent timelines and documentation raise launch costs and slow cross-border rollouts, constraining velocity in the clinical nutrition market.

Other drivers and restraints analyzed in the detailed report include:

High Healthcare & Insurance Spending Levels / Rising Incidence of Pre-Term Births & Pediatric Malnutrition / Misperceptions Among Clinicians & Patients /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Oral & Enteral solutions generated 53.7% of the clinical nutrition market size in 2024. Demand reflects clinicians' preference for less invasive feeding when gastrointestinal function remains intact. Telehealth monitoring platforms now allow dietitians to titrate formulas remotely, reducing hospital revisits and reinforcing payer confidence in home care. Hospitals are integrating smart pumps that transmit real-time metrics, enabling early troubleshooting and lowering aspiration pneumonia incidents. Parenteral products represent a smaller base but are climbing at 6.4% CAGR as mixed-oil emulsions receive broad formulary acceptance. AI engines such as TPN 2.0 calculate individualized macronutrient ratios, cutting compounding errors in NICUs. Home parenteral therapy, once limited by sepsis fears, is expanding as remote monitoring and antimicrobial lock solutions improve safety. Together, these dynamics position both modalities as complementary pillars within the clinical nutrition market.

Infant Nutrition commanded 42.1% of regional sales in 2024, buoyed by ongoing formula upgrades that add lutein, DHA, choline, and human milk oligosaccharides. Regulatory scrutiny following the 2022 contamination crisis accelerated investments in redundancy and quality controls.

Disease-Specific Enteral products are forecast to outpace the overall clinical nutrition market at 7.7% CAGR. Growth stems from oncology, renal, hepatic, and diabetes-tailored formulas that align with value-based care incentives. Weight-management drives also foster GLP-1 companion drinks fortified with high leucine content. Standard enteral continues to serve broad medical-surgical wards, while total parenteral nutrition components innovate through novel trace-element blends that lower cholestasis risk.

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The North America Clinical Nutrition Market is Segmented by Route of Administration (Oral, and More), Product Type (Infant, and More), Form (Powder and More), Application (Nutritional Support for Malnutrition, and More), by End User (Pediatric, and More), Distribution Channel (Hospital Pharmacies, and More), and Geography (United States, Canada, and Mexico). The Report Offers the Value (in USD Million) for the Above Segments.

List of Companies Covered in this Report:

Abbott Laboratories / Nestle / Fresenius / Danone / Baxter / B. Braun / BASF / Perrigo Company / Reckitt Benckiser Group / Mead Johnson Nutrition / Kate Farms / Ajinomoto Cambrooke / Medtrition Inc. / Hormel Health Labs / Victus / Otsuka / ICU Medical / Medline Industries / Grifols /

Additional Benefits:

The market estimate (ME) sheet in Excel format /

3 months of analyst support /

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