

Clinical Nutrition - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 127 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:

Clinical Nutrition Market Analysis

The clinical nutrition market size in 2026 is estimated at USD 84.31 billion, growing from 2025 value of USD 78.11 billion with 2031 projections showing USD 123.54 billion, growing at 7.94% CAGR over 2026-2031. The rising prevalence of metabolic disorders like diabetes and dysphagia is boosting the clinical nutrition market. These specialized formulations meet the growing need for essential nutrients, aiding recovery and improving health outcomes. The geriatric segment is intersecting with the rapid expansion of clinical nutrition use in oncology. As cancer cases rise, the inclusion of dietitians in pre-admission planning becomes essential, as specialized formulas are gaining importance in multidisciplinary treatment pathways. This shift creates more opportunities for the manufacturers operating in the clinical nutrition market.

Global Clinical Nutrition Market Trends and Insights

Rapid Shift Toward Home-Based Enteral Feeding in Post-Acute Care

Efforts by hospitals to shorten patient stays without compromising care quality are reshaping post-acute care, steering it towards home enteral nutrition. For example, a December 2024 article in BMC Surgery examined how different energy levels in supplementary parenteral nutrition (SPN) affect recovery for gastric cancer surgery patients. The findings linked energy intake to recovery speed, complication rates, and overall health, offering valuable insights for refining nutritional strategies in cancer treatment. This study highlights opportunities for the clinical nutrition market to develop and offer personalized nutritional

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

solutions that improve patient recovery and outcomes. As a result, there's a heightened demand for innovative nutritional products and services, especially in cancer care.

Increased Adoption of Immunonutrition Formulas for Post-Surgery Recovery

A December 2023 study in the *Journal of Surgery* highlights that perioperative blends with arginine, glutamine, and omega-3 fatty acids reduce complications after major abdominal surgeries. Hospitals are now using automated prompts in electronic admission checklists to ensure timely use, making nutritional products as essential as antibiotic prophylaxis. This shift is boosting demand in the clinical nutrition market, as procurement officers link product access to clinical outcomes. Suppliers are co-funding surgery registries to gather real-world data, speeding up evidence generation and driving market growth without relying on lengthy randomized trials.

Stringent Regulatory Requirements and Lengthy Approval Processes

Novel clinical nutrition products must meet extensive safety and efficacy standards set by the U.S. Food and Drug Administration, with the European Food Safety Authority imposing similarly rigorous benchmarks. Assembling a submission-ready file is capital-intensive, prompting smaller entrants to forge partnerships with established manufacturers. These seasoned manufacturers, equipped with experienced regulatory teams, often trade their expertise for equity. Consequently, regulatory proficiency has emerged as a competitive asset, leading investors to scrutinize a company's dossier roadmap with the same intensity as its scientific innovations.

Other drivers and restraints analyzed in the detailed report include:

Government-Funded Pediatric Malnutrition Programs Limited Insurance Coverage for Out-of-Hospital Parenteral Nutrition

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

Segment Analysis

Oral and enteral nutrition commands 69.15% of the clinical nutrition market in 2025, reflecting its established position as the preferred administration route when the gastrointestinal tract remains functional. Meanwhile, parenteral nutrition is projected to grow at a faster rate of 8.42% CAGR during 2026-2031, driven by expanding applications in critical care and oncology settings. The parenteral segment's growth is further accelerated by innovations in lipid emulsions, particularly the integration of fish oil rich in omega-3 fatty acids, which has demonstrated clinical benefits, including reduced infection rates and shorter hospital stays in critically ill patients.

In 2025, infant nutrition products held a 44.12% market share. However, disease-specific enteral formulas are projected to grow at a 8.98% CAGR through 2031. Government-led initiatives aimed at improving infant health and nutrition, such as funding for nutritional programs and guidelines for infant and child dietary needs, are significantly enhancing the availability and accessibility of nutritional formulations tailored for children. These efforts create awareness and promote compliance among caregivers, thereby driving market growth. For instance, in September 2023, the National Nutrition Council of the Philippines launched the Philippine Plan of Action for Nutrition (PPAN) 2023-2028. This strategic framework aims to combat stunting, childhood obesity, and malnutrition, driving the demand for clinical nutrition products. Such government support not only fosters innovation in clinical nutrition products tailored to combat malnutrition and obesity but also encourages investment from both public and private sectors, thereby expanding market opportunities.

The Clinical Nutrition Market is Segmented by Route of Administration (Oral and Enteral, and More), Product Type (Infant Nutrition,

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

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 (North America, Europe, and More). The Market Sizes and Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Chronic illnesses are a significant driver of the United States' staggering USD 4.5 trillion annual healthcare expenditure, accounting for nearly 90% of the total, as reported by the U.S. Centers for Disease Control and Prevention. In light of these figures, payer organizations are shifting their stance, increasingly opting to reimburse disease-specific nutrition formulas. These formulas not only address nutritional needs but also play a pivotal role in delaying more expensive medical interventions.

According to the U.S. Centers for Disease Control and Prevention, heart disease and stroke alone cost the U.S. healthcare system more than USD 250 billion annually, while diabetes imposes costs above USD 400 billion. As life expectancy climbed to 78.4 years in 2023, hospital groups intensified focus on sarcopenia and metabolic health, prompting suppliers to highlight amino-acid ratios and glycemic indices in product dossiers. For regional integrated-delivery networks, adult-diabetes formulations already account for a significant share of annual nutrition-therapy budgets, an allocation that re-prioritizes formulary reviews around metabolic metrics.

Europe stands as a sophisticated market for clinical nutrition, marked by stringent regulatory frameworks and well-established clinical practice guidelines. In March 2024, Germany launched several initiatives to enhance clinical nutrition as part of its "Good Food for Germany" strategy. This strategy, adopted by the Cabinet in January 2024, aims to improve the overall health and nutrition of the population. The German government's strategic implementation of comprehensive nutrition policies to combat malnutrition is anticipated to drive significant growth in the clinical nutrition market.

The Asia Pacific region is rapidly emerging as a lucrative market for clinical nutrition, spurred by increasing health awareness among consumers, driving demand for nutritional solutions that support overall well-being. Furthermore, government initiatives and policies promoting nutrition education and public health campaigns are fostering the adoption of healthier dietary practices. In May 2024, Fudan University School of Public Health highlighted the crucial role of food safety through a series of activities and educational programs. The initiative emphasized the importance of nutrition, particularly focusing on nutritional supplements for vulnerable populations such as the elderly and individuals with health issues. Additionally, in October 2024, the Union Health Minister (India) introduced key initiatives aimed at strengthening nutrition support for tuberculosis (TB) patients and their families. These initiatives focus on addressing the critical nutritional deficiencies often experienced by TB patients, which can hinder recovery and exacerbate health complications. By providing targeted nutritional interventions, these measures aim to enhance patient recovery rates, improve treatment adherence, and reduce the overall burden of the disease.

List of Companies Covered in this Report:

Abbott Laboratories Nestle Fresenius Baxter Danone B. Braun Perrigo Company Reckitt Benckiser Group Ajinomoto Cambrooke
AYMES International Medifood International Kate Farms

Additional Benefits:

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

Table of Contents:

1 Introduction

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rapid Shift Toward Home-Based Enteral Feeding in Post-Acute Care

4.2.2 Increased Adoption of Immunonutrition Formulas for Post Surgery Recovery

4.2.3 Government-Funded Pediatric Malnutrition Programs

4.2.4 Increasing Prevalence of Chronic Disease

4.2.5 Bundled-Payment Reimbursement Incentives for Early Parenteral Nutrition

4.2.6 Integration of AI-Enabled Nutrient Dosing Platforms in ICU Pharmacies

4.3 Market Restraints

4.3.1 Stringent Regulatory Requirements and Lengthy Approval Processes

4.3.2 Limited Insurance Coverage for Out-of-Hospital Parenteral Nutrition

4.3.3 Frequent Supply Shortages of Sterile Lipid Emulsions

4.3.4 Rising Raw-Material Prices for Medical-Grade Maltodextrin

4.4 Value Chain Analysis

4.5 Regulatory Outlook

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitutes

4.7.5 Competitive Rivalry

4.8 Clinical Trial Landscape

5 Market Size & Growth Forecasts (Value, USD)

5.1 By Route of Administration

5.1.1 Oral & Enteral

5.1.2 Parenteral

5.2 By Product Type

5.2.1 Infant Nutrition

5.2.2 Standard Enteral Formula

5.2.3 Disease-Specific Enteral Formula

5.2.4 Total Parenteral Nutrition (TPN) Components

5.3 By Form

5.3.1 Powder

5.3.2 Liquid

5.3.3 Semi-Solid

5.4 By Application

5.4.1 Nutritional Support for Malnutrition

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.4.2 Metabolic Disorders
- 5.4.3 Gastrointestinal Diseases
- 5.4.4 Cancer
- 5.4.5 Neurological Diseases
- 5.4.6 Other Diseases
- 5.5 By End User
 - 5.5.1 Pediatric
 - 5.5.2 Adult
 - 5.5.3 Geriatric
- 5.6 By Distribution Channel
 - 5.6.1 Hospital Pharmacies
 - 5.6.2 Retail Pharmacies
 - 5.6.3 Online Pharmacies
 - 5.6.4 Homecare & Specialty Clinics
- 5.7 Geography
 - 5.7.1 North America
 - 5.7.1.1 United States
 - 5.7.1.2 Canada
 - 5.7.1.3 Mexico
 - 5.7.2 Europe
 - 5.7.2.1 Germany
 - 5.7.2.2 United Kingdom
 - 5.7.2.3 France
 - 5.7.2.4 Italy
 - 5.7.2.5 Spain
 - 5.7.2.6 Rest of Europe
 - 5.7.3 Asia-Pacific
 - 5.7.3.1 China
 - 5.7.3.2 Japan
 - 5.7.3.3 India
 - 5.7.3.4 South Korea
 - 5.7.3.5 Australia
 - 5.7.3.6 Rest of Asia-Pacific
 - 5.7.4 Middle East and Africa
 - 5.7.4.1 GCC
 - 5.7.4.2 South Africa
 - 5.7.4.3 Rest of Middle East and Africa
 - 5.7.5 South America
 - 5.7.5.1 Brazil
 - 5.7.5.2 Argentina
 - 5.7.5.3 Rest of South America
- 6 Competitive Landscape
 - 6.1 Market Concentration
 - 6.2 Market Share Analysis
 - 6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 6.3.1 Abbott Laboratories
- 6.3.2 Nestle Health Science
- 6.3.3 Fresenius Kabi
- 6.3.4 Baxter International
- 6.3.5 Danone (Nutricia)
- 6.3.6 B. Braun SE
- 6.3.7 Perrigo Company
- 6.3.8 Reckitt Benckiser Group
- 6.3.9 Ajinomoto Cambrooke
- 6.3.10 AYMES International
- 6.3.11 Medifood International
- 6.3.12 Kate Farms

7 Market Opportunities & Future Outlook

7.1 White-Space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Clinical Nutrition - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 127 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-06"/>
		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