5. Development of Enteral Nutrition Preparation in China

5.1 Market Status Quo and Forecast
Enteral nutrition preparations are the main varieties in enteral nutrition support treatment. The oral enteral nutrition emulsion and suspension include TPF?TP?TPF-T and TP-HE etc different formulas. The main manufacturers are Sino-Swed Pharmaceutical Corp, Ltd. (SSPC) and Nutricia (Wuxi), the former mainly includes such brands as: Fresubin Energy Fibre, Fresubin, Supportan and Fresubin MCT 750; while the later mainly includes Nutrison fibre, Nutrison, Peptisorb Liquid and Diason etc brands.

In China, the clinical nutrition market started in 1960s-70s. After entered into China market in 1982, China-Germany joint venture Sino-Swed Pharmaceutical is the first enterprise launching fat emulsion, amino acid and other products into market. With tens of years of development, the market is segmented increasingly, each variety increases rapidly.

In recent years, with the popularization of clinical nutrition conception in China, more and more domestic enterprises set foot in this field. According to statistics, in 2010, the market scale of enteral nutrition preparation was CNY 2.21 billion in China, by the end of 2014, it was CNY 4.11 billion and increases continually.

In overall, at present, the clinical nutrition is still in development stage in China, the home-made clinical nutrition preparations still far lag behind overseas level in respects of both quality and variety, the high-grade product market is monopolized by the imported or joint-venture products. With the constant upgrades of clinical academic concepts, from the original intravenous hyperalimentation, to equal nitrogen, equal thermal treatment, to low nitrogen, low calorie parenteral nutrition solution, to enteral nutrition and to joint nutrition treatment theory, higher requirements on convenience and safety of clinical nutrition products are put forward, especially, the emergence of infusion method of “All-in-one” nutrient solution makes the concept: parenteral nutrition should give the most reasonable infusion method, become common sense clinically.

Fig.12: Market Scale of Enteral Nutrition Preparations in China, 2010-2014

Source: China Clinical Nutrition Union,

5.2 Demand Analysis and Forecast
Statistics date suggests: in enteral nutrition products, the market ratio of standard formula is the highest, hitting 77%, the special formula accounts for 17%, as shown in the following fig.:

Fig.13: Market Demand Structure of Enteral Nutrition Products in China

Source: China Clinical Nutrition Union,
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