The Market For Medical Foods
Market Potential, Demand, Competitors
July 2015

Table of Contents

Introduction & Study Scope 1-5
Explanation of the various sources used in the research of this market, and the scope of the report.

Executive Overview of Major Findings 6-12
Summary of all report chapter highlights. Discussion of medical foods definition, industry structure, what conditions medical foods are used for, major issues & trends affecting the market, end-user demand, market size and 2020 forecasts, outlook by mfrs., distribution channels, major competitors.

Market Nature and Definition: what are medical foods? 13-25
- Definition of medical foods by the FDA
- History and evolution of the products since the 1950s
- Diseases and medical conditions targeted
- End-users
- Market position in the healthcare space
- Reimbursement for Medical Food Prescriptions: private insurance, workmen’s compensation insurance.

Products: The main brands
Descriptions of products and their intended uses:
- Axona (Accera)
- Limbrel (Primus Pharmaceuticals)
- Deplin (Pamlab)
- Lofenalac (Mead Johnson Nutrition)
- Neurepa
- Immunolin
**End-User Markets & Demand Factors**

- Summary & discussion of main drivers of demand
- Aging of the U.S. population – discussion of prevalence of chronic diseases associated with aging, to 2030 (Parkinsons, diabetes, hypertension, heart disease).
- Shift to enteral nutrition.
- Demand for customized medicine
- PTSD – discussion of, no. of sufferers
- Depression - discussion of, no. of sufferers
- Osteoporosis - discussion of, no. of sufferers
- Chronic pain - discussion of, no. of sufferers
- Insomnia - discussion of, no. of sufferers
- Kidney disease - discussion of, no. of sufferers
- Necrotizing enterocolitis in low birthweight infants - discussion of, no. of sufferers
- Alzheimer’s - discussion of, no. of sufferers
- Obesity - discussion of, no. of sufferers
- Fibromyalgia - discussion of, no. of sufferers.

**Tables:**
- U.S. population projections, by age group: 2015-2050
- Population by percentage of the population: 1900 -2060
- Estimated Number of Americans With Conditions That Can Be Treated With Medical Foods: 2015

**How Providers of Medical Foods Operate**

- Discussion of the manufacturing process, how medical foods get from the mfr. to the retail pharmacists and other healthcare facilities.
- Typical profit margins, mark-ups.
- Average wholesale prices
- Pharmacist entrepreneurs.
- Reimbursement.
- On-site point-of-care dispensing, cash & carry programs.
Market Size & Growth, Forecasts

- Global market size estimate.
- Outlook for the industry by several manufacturers: obstacles to growth, positive and negative factors.

Functional Food Trends

- Discussion of functional foods and nutraceuticals, usage by consumers for Various conditions, consumer attitudes toward these products.

Distribution Channels & Target Markets

- Summary: discussion of how medical foods are distributed from the manufacturers to pharmacies, physicians and the patient.
- Profiles of 3 distributors: Samia, Emerson Ecologics, Xymogen.

Tables: Industry snapshots (Census data: no. of establishments, annual revenue per estab., payroll & sales per employee, etc. 1997, 2002, 2007, 2012 revenues) for:
- Retail pharmacies
- Mail order pharmacies
- Hospitals
- Long term care facilities, nursing homes
- Primary care MDs & specialist MDs offices
- Prescribing nurses
- Registered dieticians
- Home health care services
- Specialized disease clinics

Government Regulation of Medical Foods

- Discussion of FDA regulation and monitoring of medical foods, Orphan Drug Act of 1984, timeline of key developments and actions
- Enforcement: Warning Letters from FDA citing medical food issues, actions against various firms.
- Recently issued Medical Food Guidance/Q&A document.
- Insurance coverage, lack of it, not covered by Affordable Care Act.
- 2009 Medical Foods Equity Act – discussion.
Competitor Profiles

(company headquarters address, company history, products made and in development, specializations, acquisitions, revenues when available for public companies).

- Abbott Labs
- Actavis PLC (Ireland)
- Acasti Pharma (Canada)
- Aptalis Pharma
- Cambrooke Therapeutics
- Centrix Pharmaceuticals
- Entera Health
- Entia Biosciences
- Fresneius Kabi AG
- Ganeden Biotech
- Laser Pharmaceuticals
- Mead Johnson Nutrition Co.
- MetaGenes
- Metagenics
- Microbiome Therapeutics
- NattoPharma ASA (Norway)
- Nestle Health Sciences (Pamlab, Accera, Prometheus Labs)
- Nutricia North America
- NVN Therapeutics
- Phytomedics
- Pivotal Therapeutics
- Primus Pharmaceuticals
- Proliant Health & Biologicals
- Prismic Pharmaceuticals
- Realm Labs LLC
- Sigma-Tau Pharmaceuticals
- SKIM (Netherlands)
- Spherix
- Targeted Medical Pharma
- Valeant Pharmaceuticals
- Vaya Pharma

Reference Directory of Market Information Sources

Directory of relevant trade associations, reports, experts, published articles, other sources.