

Nutrition Business Journal[®]

Strategic Information for the Nutrition Industry



Integrative Medicine Report

2011

A review of the emerging role of integrative medicine in the U.S. healthcare market and an analysis of markets, trends, competition and strategy in the practitioner channel

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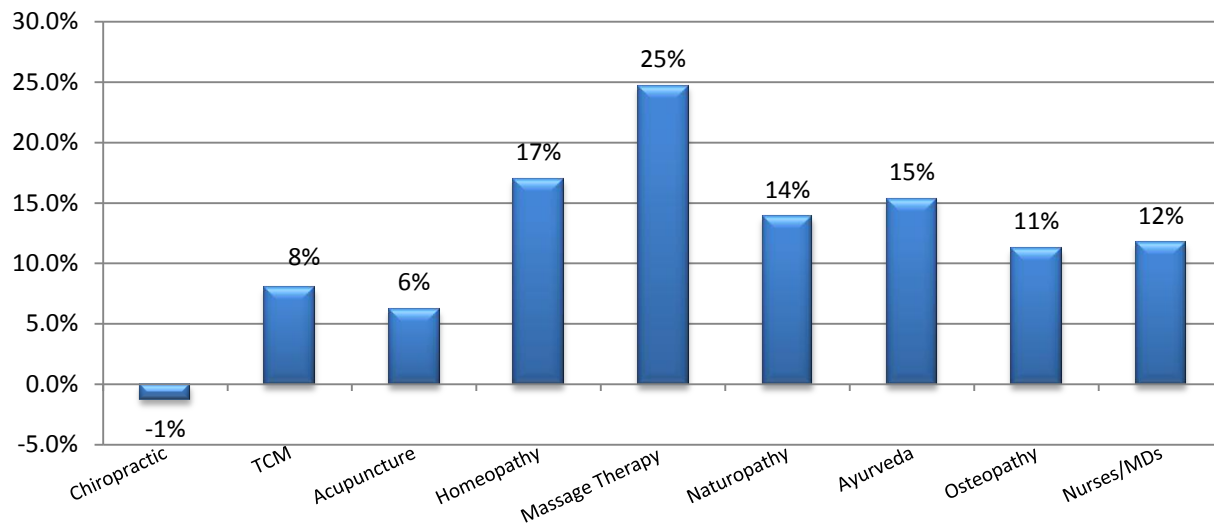
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1. EXECUTIVE SUMMARY

Figure 1-1 U.S. Practitioner Supplement Sales Growth by Modality in 2009



Source: Nutrition Business Journal estimates.

With passage of the Patient Protection and Affordable Care Act in 2010, the cards are now on the proverbial table for healthcare reform in the United States. Funding levels for a public trust long championed by Senator Tom Harkin (D-IA) increase from \$500 million in 2010 to \$2 billion annually starting in 2015, totaling \$15 billion over the next ten years. There's no clearer evidence of a shift in the national discussion of health and wellness, as well as the often heated public debate about ways to meaningfully address an escalating healthcare crisis.

"For the first time in history, we have decided not only to invest in wellness and prevention in a very significant way, but also to invest in the prevention of disease. While the ultimate presentation of healthcare reform to the American public and final authorization levels remain uncertain, especially in light of recent state court decisions to overturn the individual mandate as unconstitutional, one thing is very clear. "This law is the most significant step in the history of the United States in the language of integrative healthcare, integrative healthcare practitioners, and complementary and alternative medicine," said John Weiler, Director of the Integrator Blog. "It's a landmark moment."

Specific language in the law does give reference to the experience in, among other disciplines, preventive medicine. The power brokers in Washington have clearly warmed to integrative approaches to healthcare, and the industry stands poised to dramatically benefit from its mounting contribution to public health in the United States.

This sea change in public attitudes toward medicine bodes well for practitioners of alternative healthcare, and also for dietary supplements. "We know that practitioners are going to be the ones who are going to elevate the status of integrative medicine and give them more options to be included in insurance coverage, by default you get a healthcare community that is more favorable to integrative language calls out supplements with health claims—legitimate ones."

think of vitamin D and calcium for osteoporosis, omega-3s for heart health, and folic acid for neural tube birth defects—specifically in defining personalized health plans developed as pilot programs for certain at-risk populations.

The obstacles facing even broader acceptance of integrative practice are substantial and ingrained, but increasingly weakened by macroeconomic trends promoting thrift and patient dissatisfaction with the status quo. Experts continue to describe the current system of economics incentivizing reimbursement rather than evidence; with a too-strong bias toward drugs and technology; with a too-weak bias toward nutrition and prevention; with providers, rather than patients, in charge. Integrative approaches gain traction in the marketplace by flipping the deck on much of this construct. "The future of medicine is pointed toward George of m deli
the **Bravewell Collaborative**.

As supplements begin to flavor more and more of the discussion between doctors and patients, the condition-specific approach to their marketing has caught Todd Runestad, editor of Functional Ingredients magazine. Supplements targeting cognition, insomnia and mood disorders performed especially well in 2009, with the economic recession, rising unemployment and high levels of stress verily baked into the modern work- and lifestyle as clear causes. Supplements targeting beauty also performed well in 2009, as Baby Boomers search for natural solutions to stem the tides of aging.

NBJ's 2011 Integrative **Depth analysis of the U.S. integrative medicine market** s a n in an environment still populated with consumers looking for less-expensive alternatives to conventional healthcare. This report focuses on 10 primary modalities—Chiropractic, Traditional Chinese Medicine, Acupuncture, Homeopathy, Massage Therapy, Naturopathy, Ayurveda, Osteopathy, MDs and Nurses—and includes discussion of the key trends affecting each of these modalities and the integrative medicine industry as a whole. It also capitalizes on 13 continuous years of data, including market size, growth, revenue estimates for therapies and services, and practitioner channel supplement sales. In addition, the report includes consumer healthcare spending estimates and an analysis of the condition-specific supplement, OTC and prescription drug markets in 17 categories, ranging from anti-aging to vision.