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
# TABLE OF CONTENTS

1. EXECUTIVE SUMMARY ......................................................... 11

2. ACKNOWLEDGEMENTS & DEFINITIONS ........................................ 13
   2.1. ACKNOWLEDGEMENTS .................................................. 13
   2.2. RESEARCH METHODOLOGY ........................................... 13
   2.2.1. Disclaimer .......................................................... 14
   2.2.2. Copyright .......................................................... 14
   2.3. DEFINITIONS .......................................................... 14

3. MARKET DATA & OVERVIEW .................................................. 17
   3.1. U.S. NUTRITION INDUSTRY ......................................... 17
   3.1.1. Product Categories .............................................. 17
   3.1.2. Channel Sales ..................................................... 18
   3.1.3. Growth & Forecast ............................................... 19
   3.2. U.S. SUPPLEMENT INDUSTRY ...................................... 20
   3.2.1. Product Categories .............................................. 20
   3.2.2. Channel Sales ..................................................... 22
   3.2.3. Growth & Forecast ............................................... 24

   4.1. U.S. HEALTHCARE EXPENDITURES ................................ 27
   4.2. PRACTITIONER POPULATION ....................................... 31
   4.3. SUPPLEMENT SALES .................................................. 33
   4.4. THERAPY/SERVICE REVENUES ................................... 35
   4.5. A BRIEF HISTORY OF INTEGRATIVE MEDICINE ..................... 37
   4.6. TRENDS .............................................................. 41
   4.6.1. Nutrition Education Programs Offer Vocational Knowledge in Integrative Medicine ..................... 41
   4.6.2. Misinformation Abounds about Interactions between Supplements and Drugs .............................. 44
   4.6.3. One Man’s Quest for Integrated Health ......................... 47
   4.6.4. Corporate Wellness Programs Sprout Up as Companies Face Higher Healthcare Costs .................. 48

5. INTEGRATIVE MEDICINE MODALITIES .................................... 53
   5.1. ACUPUNCTURE ......................................................... 53
   5.1.1. Acupuncture Practitioner Population ............................ 53
   5.1.2. Supplement Sales .................................................. 54
   5.1.3. Therapy/Service Revenues ...................................... 56
   5.1.4. Trends ............................................................ 57
   5.2. AYURVEDA ............................................................ 58
   5.2.1. Ayurvedic Practitioner Population .............................. 58
   5.2.2. Supplement Sales .................................................. 59
   5.2.3. Therapy/Service Revenues ...................................... 60
   5.2.4. Trends ............................................................ 61
   5.3. CHIROPRACTIC ......................................................... 63
   5.3.1. Chiropractic Practitioner Population ............................ 63
   5.3.2. Supplement Sales .................................................. 64
   5.3.3. Therapy/Service Revenues ...................................... 66
   5.3.4. Trends ............................................................ 67
   5.4. HOMEOPATHY ......................................................... 70
   5.4.1. Homeopathic Practitioner Population ........................... 70
   5.4.2. Supplement Sales .................................................. 71
### Table of Contents

5.4.3. Therapy/Service Revenues ................................................................. 73
5.4.4. Trends ............................................................................................... 74
5.5. MASSAGE THERAPY ........................................................................... 76
5.5.1. Massage Therapy Practitioner Population ........................................ 76
5.5.2. Supplement Sales .............................................................................. 77
5.5.3. Therapy/Service Revenues ................................................................. 79
5.5.4. Trends ............................................................................................... 80
5.6. NATUROPATHY .................................................................................. 81
5.6.1. Naturopathy Practitioner Population ............................................... 81
5.6.2. Supplement Sales .............................................................................. 82
5.6.3. Therapy/Service Revenues ................................................................. 84
5.6.4. Trends ............................................................................................... 85
5.7. NURSES/MDs .................................................................................... 86
5.7.1. Nurses & MDs Practicing Integrative Medicine Population .................... 86
5.7.2. Supplement Sales .............................................................................. 87
5.7.3. Therapy/Service Revenues ................................................................. 89
5.7.4. Trends ............................................................................................... 90
5.8. OSTEOPATHY ..................................................................................... 91
5.8.1. Osteopathic Practitioner Population ................................................ 91
5.8.2. Supplement Sales .............................................................................. 92
5.8.3. Therapy/Service Revenue ................................................................. 94
5.8.4. Trends ............................................................................................... 95
5.9. TRADITIONAL CHINESE MEDICINE ............................................ 97
5.9.1. Traditional Chinese Medicine Practitioner Population .......................... 97
5.9.2. Traditional Chinese Medicine Supplement Sales .................................. 98
5.9.3. Therapy/Service Revenues ................................................................. 100
5.9.4. Trends ............................................................................................... 101

6. CONDITION SPECIFIC MARKETS .................................................. 103

6.1. OVERVIEW .......................................................................................... 103
6.2. CONDITION-SPECIFIC SEGMENTATION ............................................ 104
6.3. TRENDS ................................................................................................ 106
6.3.1. Ingredients Sell Health Condition Solutions ........................................ 106
6.3.2. Supplements Targeted to Specific Conditions Fuel Industry Growth .... 107
6.3.3. Broken Health Care Industry Creating Opportunities ......................... 108
6.3.4. Condition-Specific Marketing Limited ............................................... 108
6.3.5. Science Crucial to Success ................................................................. 109
6.4. GENERAL HEALTH ............................................................................ 111
6.5. COLD/FLU-IMMUNE .......................................................................... 113
6.5.1. Innovation Alive and Well in Immunity .............................................. 116
6.5.2. FAST-C on the Fast Track ................................................................. 119
6.6. SPORTS/ENERGY/WEIGHT-LOSS .................................................. 119
6.6.1. Energy Trends in 2011 ...................................................................... 119
6.7. BRAIN/MENTAL ACUITY ................................................................. 123
6.8. INSOMNIA ........................................................................................... 125
6.9. MOOD/DEPRESSION ......................................................................... 128
6.9.1. Mighty Melatonin ............................................................................... 131
6.9.2. One Herb to Watch: Sceletium Tortuosum ....................................... 132
6.10. MENOPAUSE ...................................................................................... 132
6.11. CARDIO/HEART HEALTH ................................................................. 136
6.12. JOINT HEALTH .................................................................................. 139
6.12.1. Supplement Firms Race In To Fill Void Created by Recalled Rx Joint Drugs .. 141
6.12.2. Primus Pharmaceuticals Takes Medical Food Route to Help Osteoarthritis Sufferers ................................................. 144
6.13. SEXUAL HEALTH .................................................. 145
6.14. BONE HEALTH .................................................. 147
6.15. GASTROINTESTINAL HEALTH ........................................ 150
6.15.1. As Digestive Problems Bloom, So Do Sales of Probiotics And Other Gut Supplements ........................................ 153
6.15.2. Using Star Power to Broach Gut Health .................................................. 154
6.15.3. Getting Probiotics Down to a Science .................................................. 154
6.15.4. Smooth Move Moving Well .................................................. 155
6.15.5. Enzymes Remain a Digestive-Health Staple .................................................. 155
6.15.6. Jigsaw Pieces Together Solutions for Chronic Pain Sufferers .................................................. 156
6.16. DIABETES .................................................. 157
6.16.2. Chromium Used for Diabetes Treatment .................................................. 162
6.16.3. DSM Bringing Back Forbidden Foods with InsuVital .................................................. 163
6.16.4. Promising Diabetes-Specific Supplements .................................................. 164
6.17. CANCER PREVENTION ................................................ 165
6.17.1. Supplement Use High Among People Looking to Treat, Prevent Cancer, Study Shows .................................................. 168
6.18. HAIR/SKIN/NAILS ................................................ 172
6.19. VISION/EYE HEALTH ................................................ 175
6.20. ANTI-AGING ................................................ 176
6.20.1. Adding Life to Your Years ................................................ 178
6.20.2. LifeVantage Corp. Aims for a Sales Comeback With its Anti-Aging Pill, Protandim .................................................. 179

7. CONSUMERS & INTEGRATIVE MEDICINE ........................................ 183
7.1. CONSUMER SUPPLEMENT USAGE & SPENDING .................................................. 183
7.2. CHILDREN’S SUPPLEMENT USAGE .................................................. 184
7.3. TOP SUPPLEMENTS USED BY ADULTS VIA PRACTITIONERS .................................................. 185
7.4. CONSUMER SUPPLEMENT SURVEY .................................................. 185
7.4.1. Supplement Users ................................................ 185
7.4.2. Non-Users ................................................ 191
7.5. TRENDS ................................................ 192
7.5.1. Recession Makes Wellness a More Urgent Priority for Most Consumer Groups .................................................. 192

8. PRACTITIONER CHANNEL ........................................ 197
8.1. NUTRITION INDUSTRY PRACTITIONER SALES ........................................ 199
8.1.1. Nutrition: Channel Comparison .................................................. 200
8.1.2. Nutrition: Product Sales .................................................. 203
8.2. SUPPLEMENT PRACTITIONER SALES ........................................ 204
8.2.1. Supplements: Channel Comparison .................................................. 205
8.2.2. Supplements: Product Sales .................................................. 207
8.2.3. Supplements: Growth and Forecast .................................................. 209
8.2.4. Top Supplement Companies in the Practitioner Channel .................................................. 211
8.3. PRACTITIONER SURVEY ................................................ 212
8.4. PRACTITIONER TRENDS ................................................ 219
8.4.1. Should Doctors Be Selling Supplements to Patients? .................................................. 219
8.4.2. Emerson Ecologics Works to Break Down Barriers Separating Practitioners and Dietary Supplements .................................................. 222
8.4.3. How to Achieve Practitioner Channel Success .................................................. 225
8.4.4. Whither Goes the Wise Woman .................................................. 226
8.4.5. Diversified Natural Products Adds Thorne Research to Growth Mix .................................................. 227
8.4.6. Case Study: Using Practitioner Endorsement to Increase Online Sales .................................................. 227

9. Q&A WITH INTEGRATIVE MEDICINE THOUGHT LEADERS ........................................ 231
9.1. WHAT DOES THE FUTURE HOLD FOR INTEGRATIVE MEDICINE? .................................................. 231
# Table of Contents

## 9.3. Hartman Group: Consumers Embrace Holistic View of Health and Wellness ......................................................... 237
## 9.4. Metagenics CEO: We Need Alticor’s Backing to Make a Dent in Chronic Illness Epidemic ........................................ 239
## 9.5. Guarneri: There’s a Time for Fish Oil, and There’s a Time for Bypass Surgery ....................................................... 242

### 10. Company & Organization Profiles ................................................. 247

#### 10.1. Company Profiles ........................................................................ 247

| 10.1.1. Abbott Labs/Ross Products (Ensure, EAS) | .......................................................... | 247 |
| 10.1.2. Alcon Labs ................................................................. | .......................................................... | 249 |
| 10.1.3. Allergy Research (KI NutriCare) .................. | .......................................................... | 250 |
| 10.1.4. Applied Nutrition Inc. (Nature’s Secret, Irwin Naturals) | ..................................................... | 251 |
| 10.1.5. Atrium Innovations (Pure Encapsulations, Douglas Labs) | ................................................ | 252 |
| 10.1.6. Bausch & Lomb .......................................................... | .......................................................... | 255 |
| 10.1.7. Designs for Health ...................................................... | .......................................................... | 256 |
| 10.1.8. Emerson Ecologics, Inc ....................................... | .......................................................... | 258 |
| 10.1.9. Enzymedica ............................................................... | .......................................................... | 260 |
| 10.1.10. Futurebiotics ............................................................ | .......................................................... | 261 |
| 10.1.11. Herbalist & Alchemist ........................................... | .......................................................... | 262 |
| 10.1.12. Martek (Amerifit Brands) ............................... | .......................................................... | 263 |
| 10.1.13. Metabolic Maintenance Products .................. | .......................................................... | 265 |
| 10.1.14. Metagenics .............................................................. | .......................................................... | 267 |
| 10.1.15. Mushroom Wisdom, Inc. (formerly Maitake Products) | ................................................ | 269 |
| 10.1.16. Nordic Naturals ....................................................... | .......................................................... | 270 |
| 10.1.17. Pioneer Nutritional Formulas Inc ......................... | .......................................................... | 272 |
| 10.1.18. Progressive Laboratories, Inc ........................ | .......................................................... | 273 |
| 10.1.19. Real Health Laboratories ..................................... | .......................................................... | 274 |
| 10.1.20. Schwabe North America (Enzymatic Therapy, Integrative Therapeutics) ............................................. | 275 |
| 10.1.22. SuperNutrition ............................................................ | .......................................................... | 278 |
| 10.1.23. Theralogix ................................................................. | .......................................................... | 279 |
| 10.1.24. Thorne Research, Inc ........................................... | .......................................................... | 280 |
| 10.1.25. Vibrant Health ........................................................... | .......................................................... | 282 |
| 10.1.26. Xymogen, Inc. ......................................................... | .......................................................... | 283 |

#### 10.2. Integrative Healthcare Organizations .......................................... 285

| 10.2.1. Alternative Medicine Integration Group ........................ | .......................................................... | 285 |
| 10.2.2. American Association of Acupuncture and Oriental Medicine | ................................................ | 285 |
| 10.2.3. American Association of Naturopathic Physicians.......... | .......................................................... | 285 |
| 10.2.4. American Chiropractic Association .......................... | .......................................................... | 285 |
| 10.2.5. American Dental Association ................................... | .......................................................... | 286 |
| 10.2.6. American Massage Therapy Association ..................... | .......................................................... | 286 |
| 10.2.7. American Medical Association .................................... | .......................................................... | 286 |
| 10.2.8. American Nurses Association ................................... | .......................................................... | 286 |
| 10.2.9. American Osteopathic Association ............................ | .......................................................... | 286 |
| 10.2.10. National Ayurvedic Medical Association .................... | .......................................................... | 287 |
| 10.2.11. National Center for Complementary and Alternative Medicine | ................................................ | 287 |
| 10.2.12. National Center for Homeopathy .............................. | .......................................................... | 287 |
INDEX OF FIGURES

Figure 1-1 U.S. Practitioner Supplement Sales Growth by Modality in 2009 .................................................. 11
Figure 3-1 U.S. Nutrition Industry Sales by Product, 1999-2009 ................................................................. 17
Figure 3-2 U.S. Nutrition Industry Sales Growth by Product, 1999-2009 ....................................................... 18
Figure 3-3 U.S. Total Nutrition Industry Sales by Channel in 2009 ............................................................. 18
Figure 3-4 U.S. Nutrition Industry Sales & Growth by Channel in 2009 .......................................................... 19
Figure 3-5 U.S. Nutrition Industry Sales by Product, 2010e-2017e ............................................................. 19
Figure 3-6 U.S. Nutrition Industry Sales Growth by Product, 2010e-2017e ..................................................... 20
Figure 3-7 U.S. Dietary Supplement Sales by Product, 1999-2009 ............................................................... 21
Figure 3-8 U.S. Dietary Supplement Sales Growth by Product, 1999-2009 ...................................................... 21
Figure 3-9 U.S. Dietary Supplement Sales by Product as % of Total, 1999-2009 ......................................... 22
Figure 3-10 U.S. Dietary Supplement Sales by Channel in 2009 ............................................................... 23
Figure 3-11 U.S. Dietary Supplement Sales and Annual Growth by Channel, 2006-2009 ......................... 23
Figure 3-12 U.S. Dietary Supplements Product Category Sales Growth, 2000-2017e ............................... 24
Figure 3-13 U.S. Dietary Supplements vs. Total Nutrition Industry Sales Growth, 2000-2017e .............. 25
Figure 4-1 U.S. Healthcare Industry Expenditures, 2003-2010e ................................................................. 28
Figure 4-2 U.S. Gross Domestic Product vs. National Healthcare Expenditures Growth, 2000-2010e .. 29
Figure 4-3 U.S. Prescription Drug, OTC and Supplement Product Sales Growth, 2000-2010e .......... 30
Figure 4-4 U.S. Integrative Licensed, Lay, Student & Part-Time Practitioner Population & Growth, 2000-2017e 31
Figure 4-5 U.S. Practitioner Population by Modality, 2000-2009 ............................................................... 32
Figure 4-6 U.S. Practitioner Population by Modality, 2010e-2017e .............................................................. 33
Figure 4-7 U.S. Integrative Medicine Supplement Sales & Growth, 2000-2017e .......................................... 34
Figure 4-8 U.S. Practitioner Supplement Sales by Modality, 2000-2009 ...................................................... 34
Figure 4-9 Forecasted U.S. Practitioner Supplement Sales by Modality, 2010e-2017e ............................. 35
Figure 4-10 U.S. Integrative Medicine Service Revenues & Growth, 2000-2017e .......................................... 36
Figure 4-11 U.S. Practitioner Service Revenues by Modality, 2000-2009 .................................................... 36
Figure 4-12 Forecasted U.S. Practitioner Service Revenues by Modality, 2010e-2017e ............................ 37
Figure 5-1 U.S. Acupuncture Professional Population & Growth, 2000-2017e ........................................... 53
Figure 5-2 U.S. Acupuncturist Population, Licensed vs. Lay, 2000-2009 .................................................... 53
Figure 5-3 U.S. Acupuncture Supplement Sales & Growth, 2000-2017e ..................................................... 54
Figure 5-4 U.S. Acupuncturist Supplement Sales & Growth, 2000-2009 ..................................................... 54
Figure 5-5 U.S. Acupuncturist Supplement Forecast Sales & Growth, 2010e-2017e .............................. 55
Figure 5-6 U.S. Acupuncturist Supplement Sales as % of Total Practitioner Supplement Sales in 2009 .... 55
Figure 5-7 U.S. Acupuncture Service Revenues & Growth, 2000-2017e ...................................................... 56
Figure 5-8 U.S. Acupuncturist Service Revenues & Growth, 2000-2009 ..................................................... 56
Figure 5-9 U.S. Acupuncturist Forecast Service Revenues & Growth, 2010e-2017e .................................... 57
Figure 5-10 U.S. Ayurvedic Practitioner Population & Growth, 2000-2017e ............................................. 58
Figure 5-11 U.S. Ayurvedic Population, Licensed vs. Lay, 2000-2009 .......................................................... 58
Figure 5-12 U.S. Ayurveda Supplement Sales & Growth, 2000-2017e ............................................................ 59
Figure 5-13 U.S. Ayurveda Supplement Sales & Growth, 2000-2009 .............................................................. 59
Figure 5-14 U.S. Ayurveda Supplement Forecast Sales & Growth, 2010e-2017e ........................................... 60
Figure 5-15 U.S. Ayurveda Service Revenues & Growth, 2000-2017e ........................................................... 60
Figure 5-16 U.S. Ayurveda Service Revenues & Growth, 2000-2009 ............................................................... 61
Figure 5-17 U.S. Ayurveda Forecast Service Revenues & Growth, 2010e-2017e ......................................... 61
Figure 5-18 U.S. Chiropractic Practitioner Population & Growth, 2000-2017e ........................................... 63
Figure 5-19 U.S. Chiropractic Practitioner Population, Licensed vs. Lay, 2000-2009 ................................... 63
Index of Figures

Figure 5-20 U.S. Chiropractic Supplement Sales & Growth, 2000-2017e ....................................................... 64
Figure 5-21 U.S. Chiropractic Supplement Sales & Growth, 2000-2009 .......................................................... 64
Figure 5-22 U.S. Chiropractic Supplement Forecast Sales & Growth, 2010e-2017e ........................................ 65
Figure 5-23 U.S. Chiropractic Supplement Sales as a % of Total Practitioner Supplement Sales in 2009 .......... 65
Figure 5-24 U.S. Chiropractic Service Revenues & Growth, 2000-2017e ..................................................... 66
Figure 5-25 U.S. Chiropractic Service Revenues & Growth, 2000-2009 .......................................................... 66
Figure 5-26 U.S. Chiropractic Forecast Service Revenues & Growth, 2010e-2017e ........................................ 67
Figure 5-27 U.S. Homeopathic Practitioner Population & Growth, 2000-2017e ............................................. 70
Figure 5-28 U.S. Homeopathic Practitioner Population, Licensed vs. Lay, 2000-2009 .................................... 70
Figure 5-29 U.S. Homeopathic Supplement Sales & Growth, 2000-2017e .................................................... 71
Figure 5-30 U.S. Homeopathic Supplement Sales & Growth, 2000-2009 .................................................... 71
Figure 5-31 U.S. Homeopathic Supplement Forecast Sales & Growth, 2010e-2017e .................................... 72
Figure 5-32 U.S. Homeopathic Supplement Sales as a % of Total Practitioner Supplement Sales in 2009 .... 72
Figure 5-33 U.S. Homeopathic Service Revenues & Growth, 2000-2017e ..................................................... 73
Figure 5-34 U.S. Homeopathic Service Revenues & Growth, 2000-2009 .................................................... 73
Figure 5-35 U.S. Homeopathic Forecast Service Revenues & Growth, 2010e-2017e .................................... 74
Figure 5-36 U.S. Massage Therapy Practitioner Population & Growth, 2000-2017e ...................................... 76
Figure 5-37 U.S. Massage Therapy Practitioner Population, Licensed vs. Lay, 2000-2009 ............................ 76
Figure 5-38 U.S. Massage Therapy Supplement Sales & Growth, 2000-2017e ........................................... 77
Figure 5-39 U.S. Massage Therapy Supplement Sales & Growth, 2000-2009 ............................................. 77
Figure 5-40 U.S. Massage Therapy Supplement Forecast Sales & Growth, 2010e-2017e ........................... 78
Figure 5-41 U.S. Massage Therapy Supplement Sales as a % of Total Practitioner Supplement Sales in 2009 ..... 78
Figure 5-42 U.S. Massage Therapy Service Revenues & Growth, 2000-2017e ............................................. 79
Figure 5-43 U.S. Massage Therapy Service Revenues & Growth, 2000-2009 ............................................. 79
Figure 5-44 U.S. Massage Therapy Forecast Service Revenues & Growth, 2010e-2017e ........................... 80
Figure 5-45 U.S. Naturopathy Practitioner Population & Growth, 2000-2017e ........................................... 81
Figure 5-46 U.S. Naturopathy Practitioner Population, Licensed vs. Lay, 2000-2009 .................................... 81
Figure 5-47 U.S. Naturopathy Supplement Sales & Growth, 2000-2017e .................................................. 82
Figure 5-48 U.S. Naturopathy Supplement Sales & Growth, 2000-2009 .................................................. 82
Figure 5-49 U.S. Naturopathy Supplement Forecast Sales & Growth, 2010e-2017e .................................. 83
Figure 5-50 U.S. Naturopathy Supplement Sales as a % of Total Practitioner Supplement Sales in 2009 ........ 83
Figure 5-51 U.S. Naturopathy Service Revenues & Growth, 2000-2017e ................................................... 84
Figure 5-52 U.S. Naturopathy Service Revenues & Growth, 2000-2009 ................................................... 84
Figure 5-53 U.S. Naturopathy Forecast Service Revenues & Growth, 2010e-2017e .................................. 85
Figure 5-54 U.S. Nurse/MD Practitioner Population & Growth, 2000-2017e ............................................. 86
Figure 5-55 U.S. Nurse/MD Practitioner Population, Licensed vs. Lay, 2000-2009 .................................... 86
Figure 5-56 U.S. Nurse/MD Supplement Sales & Growth, 2000-2017e ................................................... 87
Figure 5-57 U.S. Nurse/MD Supplement Sales & Growth, 2000-2009 ................................................... 87
Figure 5-58 U.S. Nurse/MD Supplement Forecast Sales & Growth, 2010e-2017e .................................... 88
Figure 5-59 U.S. Nurse/MD Supplement Sales as a % of Total Practitioner Supplement Sales in 2009 .......... 88
Figure 5-60 U.S. Nurse/MD Service Revenues & Growth, 2000-2017e ................................................... 89
Figure 5-61 U.S. Nurse/MD Service Revenues & Growth, 2000-2009 ................................................... 89
Figure 5-62 U.S. Nurse/MD Forecast Service Revenues & Growth, 2010e-2017e .................................. 89
Figure 5-63 U.S. Osteopathic Practitioner Population & Growth, 2000-2017e .......................................... 91
Figure 5-64 U.S. Osteopathic Practitioner Population, Licensed vs. Lay, 2000-2009 .................................... 91
Figure 5-65 U.S. Osteopathic Supplement Sales & Growth, 2000-2017e ................................................... 92
Figure 5-66 U.S. Osteopathic Supplement Sales & Growth, 2000-2009 ................................................... 92

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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 that integrative medicine has entered the mainstream 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 just to pay lip service to wellness and prevention, but actually to invest in wellness and prevention in a very robust way,” said Senator Harkin in a September floor statement. 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, for the first time, directly and explicitly includes the concepts and language of integrative healthcare, integrative healthcare practitioners, and complementary and alternative medicine,” said John Weeks, publisher and editor of the Integrator Blog. “That’s a change.”

Specific language in the law does give reference to “integrative health” in delineating the top priorities of a health council tasked with enacting the law. President Obama himself is also tasked with the establishment of an advisory panel to guide the council, defined as “a diverse group of licensed health professionals, including integrative health practitioners” with 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 of alternative medicine are very much interested in our product,” said Steve Mister, CEO of the Council for Responsible Nutrition. “If you elevate their stature and give them more options to be included in insurance coverage, by default you get a healthcare community more favorable to supplements.” The current legislative language calls out supplements with health claims—
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 healthcare as a system of “sickcare,” with the 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 team delivery with the patient at the center,” said Penny George of 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 hold. “It makes so much sense to consumers,” said 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 Medicine report features an in-depth analysis of the U.S. integrative medicine market 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.