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Global Mannan Oligosaccharide Market Size study, by Application (Infant Formula, Dietary Supplement, Functional Food, Pharmaceuticals, Cosmetics), by Source (Yeast, Bacteria, Plants, Seaweed), by Degree of Polymerization (DP 2-5, DP 6-10, DP 11-20, DP >20), by End-User (Hospitals, Pharmacies, Retail Stores, E-commerce Platforms) and Regional Forecasts 2022-2032

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Abstracts

Global Mannan Oligosaccharide Market is valued approximately at USD 0.81 billion in 2023 and is anticipated to grow with a robust CAGR of more than 8.00% over the forecast period 2024-2032. Mannan Oligosaccharides (MOS), a class of functional oligosaccharides derived from the cell walls of yeasts and other natural sources, are revolutionizing the landscape of nutritional science and human health. Known for their prebiotic benefits and ability to support gut health, immune modulation, and anti-pathogenic activity, MOS have found rising utility in various sectors including functional foods, infant nutrition, pharmaceuticals, and cosmetics. As modern consumers increasingly seek holistic wellness solutions and preventive healthcare products, MOS have emerged as indispensable components of innovative formulations that blend science with wellness.

The rise in gastrointestinal health concerns and the growing awareness of the microbiome's role in overall well-being have significantly influenced the uptake of MOS-enriched products. Particularly in the infant formula and dietary supplement industries, these oligosaccharides are being actively utilized for their non-digestible fiber content and capacity to foster beneficial gut flora. Moreover, as the industry pivots away from

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synthetic additives and embraces bio-based alternatives, MOS are gaining momentum due to their plant- and yeast-based origins. The pharmaceutical domain is also tapping into their potential as drug delivery agents and immune boosters, thereby creating new avenues for commercial exploration.

From cosmetic formulations boasting skin barrier enhancement to dietary applications targeting metabolic and digestive wellness, the versatility of MOS continues to expand. Functional foods fortified with MOS are becoming increasingly popular in both Western and Asian markets, especially as consumers associate digestive health with holistic vitality. Furthermore, the degree of polymerization (DP) in MOS directly influences its biological function, thereby enabling manufacturers to design products with specific physiological outcomes. Advances in extraction techniques and fermentation technologies are further enhancing the purity and efficacy of MOS ingredients, paving the way for customized and precision-targeted product lines.

The competitive dynamics of the MOS market are increasingly shaped by research collaborations, regulatory clearances, and strategic expansions. Several biotechnology and nutraceutical companies are forming partnerships to co-develop MOS-based solutions that address market-specific health concerns. Additionally, with e-commerce platforms becoming mainstream distribution channels, accessibility of MOS products has improved dramatically—especially for smaller, niche brands. Regulatory authorities across North America and Europe are steadily acknowledging the safety and functional benefits of MOS, catalyzing product launches and bolstering consumer trust in these bioactive ingredients.

Regionally, North America currently dominates the Mannan Oligosaccharide market, driven by well-informed consumers, a thriving functional food industry, and a high degree of product innovation. Europe follows closely, benefiting from robust regulatory frameworks and rising demand for natural healthcare products. Meanwhile, Asia Pacific is expected to witness the fastest growth rate over the forecast period, fueled by growing health consciousness, rapid urbanization, and a booming middle-class population with increasing disposable income. Latin America and the Middle East & Africa are also progressively integrating MOS-based offerings, aided by expanding retail networks and greater emphasis on preventive nutrition.

Major market player included in this report are:

Beneo GmbH

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DuPont Nutrition & Health

Yakult Pharmaceutical Industry Co., Ltd.

Royal DSM

Jarrow Formulas, Inc.

Ingredion Incorporated

Nexira

Biofeed Technology Inc.

RIBUS Inc.

Tata Chemicals Ltd.

Orffa International Holding B.V.

Kerry Group plc

Lesaffre Group

Cargill, Inc.

Lallemand Inc.

The detailed segments and sub-segment of the market are explained below:

By Application

Infant Formula

Dietary Supplement

Functional Food

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- Pharmaceuticals
- Cosmetics

By Source

- Yeast
- Bacteria
- Plants
- Seaweed

By Degree of Polymerization

- DP 2–5
- DP 6–10
- DP 11–20
- DP >20

By End-User

- Hospitals
- Pharmacies
- Retail Stores
- E-commerce Platforms

By Region:

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North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

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Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

RoMEA

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

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Demand side and supply side analysis of the market.

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