

Global Human Milk Fortifier Market: Analysis By Form (Powder and Liquid), By Distribution Channel (Offline and Online), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Human milk fortifier is a nutritional supplement added to breast milk to enhance its nutritional content and support the growth and development of premature infants. It is typically made from processed cow's milk protein with added nutritional supplements and is designed to provide the necessary energy, protein, vitamins, minerals, and salts that breast milk alone may not provide for rapidly growing premature infants. Human milk fortifiers have been shown to reduce the risk of necrotizing enterocolitis (NEC) and possibly late-onset sepsis in premature infants. The global human milk fortifier market value in 2023 stood at US\$300.28 million, and is likely to reach US\$533.42 million by 2029.

Human milk fortifier market has experienced significant growth over the years primarily due to increasing incidence of preterm births worldwide. This increasing trend has created a significant demand for human milk fortifiers, as these infants require enhanced nutritional support to aid their development and growth. Additionally, increasing disposable income coupled with the growing awareness among parents about the benefits of human milk fortifiers for preterm infants has led to increased adoption. The expansion of healthcare infrastructure, including neonatal intensive care units (NICUs), has created a favorable environment for the human milk fortifier market growth. Further as research continues to uncover the specific nutritional needs of individual premature and low birth weight infants, manufacturers are likely to develop more targeted fortifiers. Other significant trends include increasing adoption of organic and natural ingredients, rise of e-commerce, new ways of feeding fortifier etc. The global human milk fortifier market value is projected to grow at a CAGR of 10.05%,

during the forecast period of 2024-2029.

Market Segmentation Analysis:

By Form: According to the report, the global human milk fortifier market is bifurcated into two segments based on the form: powder and liquid. Powder segment acquired majority of share in the market in 2023 and is the fastest growing segment as well due to its longer shelf life, ease of storage, and convenience in transportation compared to liquid forms. Powdered HMFs offer greater flexibility in usage, allowing precise measurement and easy mixing with breast milk, which is particularly beneficial for healthcare providers in neonatal intensive care units (NICUs). Additionally, the production and distribution costs for powdered forms are generally lower, making them a more cost-effective option for both manufacturers and consumers. These advantages have driven the widespread adoption and rapid growth of the powdered segment in the market.

By Distribution Channel: According to the report, the global human milk fortifier market is bifurcated into two distribution channels: offline and online. Offline acquired majority of share in the market in 2023 due to the established trust and reliability associated with purchasing medical and nutritional products through traditional channels. Hospitals, pharmacies, and specialty stores provide direct access to HMF products, ensuring immediate availability and professional guidance, which is crucial for parents and healthcare providers. Additionally, the offline channel benefits from longstanding relationships between manufacturers and healthcare institutions, facilitating bulk purchasing and consistent supply. While, the online segment is experiencing rapid growth in the global human milk fortifier market due to the convenience of e-commerce platforms. The widespread use of the internet and smartphones facilitates better product comparison, access to detailed product information, reviews, and home delivery services, making online shopping more appealing. Additionally, the COVID-19 pandemic accelerated the shift towards online purchasing due to social distancing measures and lockdowns, further driving the adoption of e-commerce for essential medical and nutritional products like human milk fortifiers.

By Region: The report provides insight into the human milk fortifier market based on the geographical operations, namely, North America, Europe, Asia Pacific, Latin America and Middle East and Africa. The North America human milk fortifier market enjoyed the highest market share in 2023 as North America is known for its advanced healthcare infrastructure and high awareness levels. The region also has a strong presence of key market players like Abbott, etc. Additionally, supportive government initiatives, robust research and development activities, and a higher prevalence of preterm births requiring

specialized nutritional support contribute to the market's growth.

While, Asia Pacific region has been experiencing fastest growth in the global human milk fortifier market due to higher prevalence of preterm births. Additionally, the region is witnessing rapid economic development and urbanization, leading to improved healthcare access and awareness about infant nutrition among a growing middle-class population. Moreover, there has been increasing adoption of Western dietary patterns, rising disposable incomes, and a shift towards nuclear families, all of which contribute to higher demand for specialized infant nutrition products like human milk fortifiers. Additionally, governments in countries like China, India, and Japan are focusing on improving maternal and child healthcare outcomes, which includes promoting the use of fortified breast milk for premature infants and those with specific nutritional needs.

India is expected to register the fastest growth in the Asia Pacific's human milk fortifier market. India has a large population with a significant proportion of premature births and infants requiring specialized nutritional support. As awareness about the benefits of human milk fortifiers increases among healthcare professionals and parents, there is a growing acceptance and adoption of these products to improve infant health outcomes.

Global Human Milk Fortifier Market Dynamics:

Growth Drivers: One of the most important factors driving the growth of global human milk fortifier market is the increasing number of preterm births. Preterm birth, defined as birth before 37 weeks of gestation, is a growing concern worldwide. Babies born too early (especially before 32 weeks) have higher rates of death and disability. In 2021, preterm birth and low birth weight accounted for about 14.8% of infant deaths (deaths before 1 year of age). According to CDC, in 2022, preterm birth affected about 1 of every 10 infants born in the US. This increasing prevalence of preterm births influences the demand for human milk fortifiers. Preterm infants often have greater nutritional requirements than full-term infants due to their underdeveloped organs and rapid growth needs. Human milk alone may not suffice to meet these needs, necessitating the use of fortifiers to enrich breast milk with additional nutrients such as proteins, vitamins, and minerals. Other factors driving the growth of global human milk fortifier market include rising disposable income, growing awareness and advocacy, expansion of neonatal intensive care units (NICUs), supportive government policies and initiatives, lack of nutrition in breast milk, etc.

Challenges: One significant challenge faced by the global human milk fortifier market is the limited availability of human milk donors and ethical concerns. Human milk fortifiers

often rely on donor human milk to provide the necessary nutrients for preterm and low birth weight infants, but the supply of donor milk is frequently insufficient to meet growing demand. This scarcity can limit the production and availability of fortified human milk products. Additionally, ethical concerns related to the sourcing of human milk, such as ensuring voluntary and informed consent from donors, fair compensation, and the potential exploitation of donors, complicate the process. Another challenge might include stringent regulatory requirements, etc.

Trends: A key trend in the global human milk fortifier market is the personalized nutrition trend. There is a growing demand for customized nutritional solutions tailored to the specific needs of individual infants. This approach recognizes that each baby may have unique nutritional requirements based on factors like gestational age, health conditions, and genetic predispositions. Advances in medical research and technology allow for more precise formulations of human milk fortifiers that optimize growth and development outcomes for preterm infants and those with specific health challenges. By offering personalized nutrition solutions, manufacturers aim to enhance the effectiveness of fortifiers, improve infant health outcomes, and cater to the increasing demand for customized healthcare products among parents and healthcare providers alike. The market is also projected to grow at a fast pace during the forecast period, due to various other latest trends such as rising consumer online buying trends, expansion in emerging economies, new ways of feeding fortifiers to infants, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic had a negative impact on the human milk fortifier market. Initial lockdowns caused manufacturing and logistics delays, leading to HMF shortages. Hospitals reduced human milk bank orders due to financial and trust issues. Demand surged in neonatal intensive care units (NICUs) for fortified milk to support infants born to mothers with COVID-19. However, the economic downturn strained healthcare budgets and affected the purchasing power of parents, altering market dynamics.

In the post-COVID scenario, the human milk fortifier market has experienced gradual recovery as due to prompting shifts in distribution channels towards telehealth and e-commerce platforms. Innovations in product development, such as organic options and enhanced nutrient profiles, have catered to heightened demand for fortified nutrition. Economic recovery efforts and increased healthcare investments in emerging markets are bolstering market expansion, while manufacturers are addressing price sensitivity through diversified product offerings. The trend towards local production aims to ensure supply chain stability amid global uncertainties, potentially fostering market

consolidation through strategic partnerships and acquisitions.

Competitive Landscape and Recent Developments:

The global human milk fortifier market is fragmented and competitive catering to domestic and international demand. Players operating in the global human milk fortifier market focus on providing high-quality products to fulfill customer demand. These players have a well-established customer base and dominate the market ranking with a high market share in the global human milk fortifier market. Key players of global human milk fortifier market are:

Abbott

Reckitt Benckiser Group PLC

Nestle SA

Prolacta Bioscience

NeoLacta Lifesciences Pvt Ltd.

Raptakos Brett & Co. Ltd.

NeoKare Nutrition Ltd.

Lead Care International

Leo Nutriscience LLP

HHPL Healthcare

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in December 2021, Prolacta Bioscience introduced human milk fortifiers in Japan. The launch was aimed at entering the untapped market in the country and helping improve the health of newborn babies. In September 2021, Neolacta Lifesciences Pvt. Ltd launched its products on e-commerce platforms to ensure easy availability of its products such as Neolacta Human Breast Milk and Neolacta MMF (Mother's Milk Fortifier) to parents.

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