

Global 3'-Sialyllactose (3'-SL) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 3'-Sialyllactose (3'-SL) market size is expected to reach \$ 96 million by 2032, rising at a market growth of 16.7% CAGR during the forecast period (2026-2032).

In 2025, global 3'-Sialyllactose production reached approximately 160 tons, with an average global market price of around US\$195 per kilogram. 3'-Sialyllactose (3'-SL) is a sialylated (acidic) trisaccharide composed of d-glucose, d-galactose and NANA. 3'-SL is an abundant sialylated HMO in human milk.

The global 3'-SL market is moving from technical validation toward regulation-led commercialization, and the real competitive battleground is no longer only capacity, but also fermentation manufacturing, purity control, cross-border registration, and supply reliability. Public disclosures show that Kyowa Hakko Bio completed an HMO production facility in Thailand and started commercial production in 2022, received FDA no-question letters for 3'-SL and related HMOs in 2023, and obtained EU novel-food approval for 3'-SL in 2024, allowing use across multiple food categories in the EU. From an analyst's perspective, infant nutrition and premium formulation strategies that seek ingredients closer to human milk are strengthening the value proposition of 3'-SL, while FDA GRAS records also show that more than one party has pursued compliance pathways, suggesting the category is not locked to a single supplier. However, high purity requirements, complex processing, long approval timelines, cost pressure, and supply-chain concentration still constrain faster scale-up. Company reporting also notes that intensified competition and rising costs have already affected project economics, so 3'-SL looks more like a high-value, tightly regulated, stepwise-expansion ingredient than a mass-market commodity.

This report studies the global 3'-Sialyllactose (3'-SL) production, demand, key

manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 3'-Sialyllactose (3'-SL) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 3'-Sialyllactose (3'-SL) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 3'-Sialyllactose (3'-SL) total production and demand, 2021-2032, (Tons)

Global 3'-Sialyllactose (3'-SL) total production value, 2021-2032, (USD Million)

Global 3'-Sialyllactose (3'-SL) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global 3'-Sialyllactose (3'-SL) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: 3'-Sialyllactose (3'-SL) domestic production, consumption, key domestic manufacturers and share

Global 3'-Sialyllactose (3'-SL) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global 3'-Sialyllactose (3'-SL) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global 3'-Sialyllactose (3'-SL) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global 3'-Sialyllactose (3'-SL) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Novonesis, Inbiose, DSM (Glycom A/S), Kyowa Hakko Bio, GeneChem Inc., Elicityl, Zhuhai Langjian Biotechnology, Shanghai Huich Biotech, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 3'-Sialyllactose (3'-SL) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 3'-Sialyllactose (3'-SL) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 3'-Sialyllactose (3'-SL) Market, Segmentation by Type:

Microbial Fermentation

Enzymatic Synthesis

Global 3'-Sialyllactose (3'-SL) Market, Segmentation by Assay:

Assay ?80%

Assay ?90%

Global 3'-Sialyllactose (3'-SL) Market, Segmentation by Grade:

Food Grade

Research Grade

Global 3'-Sialyllactose (3'-SL) Market, Segmentation by Application:

Infant Formula

Food

Others

Companies Profiled:

Novonesis

Inbiose

DSM (Glycom A/S)

Kyowa Hakko Bio

GeneChem Inc.

Elicityl

Zhuhai Langjian Biotechnology

Shanghai HuicH Biotech

Key Questions Answered:

1. How big is the global 3'-Sialyllactose (3'-SL) market?
2. What is the demand of the global 3'-Sialyllactose (3'-SL) market?
3. What is the year over year growth of the global 3'-Sialyllactose (3'-SL) market?

4. What is the production and production value of the global 3'-Sialyllactose (3'-SL) market?
5. Who are the key producers in the global 3'-Sialyllactose (3'-SL) market?
6. What are the growth factors driving the market demand?

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