

Global Lacto-N-neotetraose (LNnT) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Lacto-N-neotetraose (LNnT) market size was valued at US\$ 144 million in 2025 and is forecast to a readjusted size of US\$ 465 million by 2032 with a CAGR of 18.7% during review period.

In 2025, global Lacto-N-neotetraose (LNnT) production reached approximately 714 tons, with an average global market price of around US\$196 per kilogram. Lacto-N-neotetraose (LNnT) is a neutral, non-fucosylated human milk oligosaccharide composed of glucose, galactose, and N-acetylglucosamine, with the structure $\text{Gal}\beta 1\text{-4GlcNAc}\beta 1\text{-3Gal}\beta 1\text{-4Glc}$. It is water-soluble and biocompatible, and functions as a prebiotic substrate in infant nutrition, supporting the growth of beneficial gut microbiota. LNnT also contributes to the modulation of gut microbiota composition and plays a role in immune-related functions.

The global Lacto-N-neotetraose market reached a pivotal juncture in 2026, with three core markets advancing in parallel. In the EU, lacto-N-tetraose received novel food authorization in February 2026 with five-year data protection, completing the regulatory matrix alongside already-approved LNnT. At the FDA, Long Health's LNnT GRAS notice entered review in March 2026, signaling substantive progress toward the world's most stringent market. In China, LNnT-enriched infant formula products from multiple domestic players have gained regulatory approval, with Long-Health becoming the first domestic LNnT-approved enterprise. On the supply side, Baolingbao's 2,500-ton HMO project is substantially complete, Long-Health's 260-ton phase one is in trial production with 740 tons expected in 2026, and Bloomage's thousand-ton line is under construction. However, the transition from regulatory access to full commercialization hinges on three variables: the pace of cross-jurisdictional regulatory harmonization, the

maturity of multi-HMO synergistic formulations, and the speed of global supply chain transition from import dependence toward self-sufficiency. In essence, LNnT is accelerating into large-scale commercialization driven by dual engines of globally synchronized regulatory clearance and indigenous capacity build-out.

This report is a detailed and comprehensive analysis for global Lacto-N-neotetraose (LNnT) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Lacto-N-neotetraose (LNnT) market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Lacto-N-neotetraose (LNnT) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Lacto-N-neotetraose (LNnT) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Lacto-N-neotetraose (LNnT) market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Lacto-N-neotetraose (LNnT)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Lacto-N-neotetraose (LNnT) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Novonesis, DSM (Glycom A/S), Inbiose, Shandong Henglu Biotechnology, Zhuhai Langjian Biotechnology, Synaura Biotechnology, etc.

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

Market Segmentation

Lacto-N-neotetraose (LNnT) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Purity ? 80%

Purity ? 90%

Purity ? 98%

Market segment by Application

Infant Formula

Food

Others

Major players covered

Novonesis

DSM (Glycom A/S)

Inbiose

Shandong Henglu Biotechnology

Zhuhai Langjian Biotechnology

Synaura Biotechnology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Lacto-N-neotetraose (LNnT) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Lacto-N-neotetraose (LNnT), with price, sales quantity, revenue, and global market share of Lacto-N-neotetraose (LNnT) from 2021 to 2026.

Chapter 3, the Lacto-N-neotetraose (LNnT) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Lacto-N-neotetraose (LNnT) breakdown data are shown at the

regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Lacto-N-neotetraose (LNnT) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Lacto-N-neotetraose (LNnT).

Chapter 14 and 15, to describe Lacto-N-neotetraose (LNnT) sales channel, distributors, customers, research findings and conclusion.

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