

Global Milk Fat Globule Membrane (MFGM) Ingredients Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Milk Fat Globule Membrane (MFGM) Ingredients market size is expected to reach \$ 746 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

Milk Fat Globule Membrane Ingredients are industrial dairy-derived functional ingredients produced by concentrating and standardising bioactive components naturally associated with the membrane surrounding milk fat droplets. Commercial products are manufactured from pasteurised cheese whey, whey-protein processing streams, cream and anhydrous milk-fat processing streams, buttermilk-derived materials or pre-concentrated milk phospholipid feedstocks through membrane separation, centrifugation, selective extraction, gentle concentration and spray drying. The market primarily covers whey protein matrix MFGM concentrates, MFGM lipid concentrates and standardised milk phospholipid extracts containing combinations of phospholipids, sphingomyelin, gangliosides, membrane proteins, immunoglobulins and lactoferrin. Product specifications vary considerably, ranging from protein-dominant concentrates with protein content near 70% to lipid-dominant and phospholipid-standardised ingredients designed for lower-dose nutritional fortification. These ingredients are supplied mainly to infant and young child formula manufacturers, while expanding into nutritional powders, ready-to-drink nutritional beverages, fermented dairy products, nutrition bars, bakery products and capsule or tablet supplements.

Key Findings

Global sales volume reached approximately 8340 tons in 2025 and is estimated

at 9460 tons in 2026

The weighted average selling price is estimated at US\$46.5 per kg in 2025 and US\$46.0 per kg in 2026

Whey protein matrix MFGM concentrates account for nearly four-fifths of global sales volume

Infant and young child formula represents slightly more than four-fifths of total downstream demand

Market Trends

The Milk Fat Globule Membrane Ingredients market is moving from a specialised infant-formula ingredient category toward a broader lifelong-nutrition platform. Product development is becoming more specification-driven, with suppliers differentiating products by protein concentration, phospholipid composition, source stream, preservation of heat-sensitive bioactive proteins and compatibility with wet or dry blending. Premium dry-blend grades are gaining attention because they allow formula manufacturers to add MFGM after intensive thermal processing while retaining more native immunoglobulin and lactoferrin functionality. In parallel, lipid-rich MFGM and standardised milk phospholipid ingredients are being positioned for adult cognition, mood, stress management and healthy-aging formulations. The widening of regulatory acceptance is also supporting geographic expansion: MFGM ingredients gained new infant-nutrition access in Thailand and Australia during 2025, while European regulatory clarification broadened permissible food applications. These changes are gradually shifting the industry from a small number of single-purpose ingredients toward differentiated portfolios serving paediatric, adult and functional-food markets.

Market Dynamics

Drivers

Growth is primarily driven by premiumisation in infant and young child formula, demand for formulations that more closely reproduce selected structural and functional characteristics of human milk, and increasing customer preference for clinically documented bioactive dairy ingredients. MFGM delivers a combination of phospholipids,

sphingolipids, gangliosides and membrane-associated proteins that cannot be replicated by conventional whey protein or vegetable-oil systems alone. Regulatory approvals in additional markets reduce formulation barriers and allow multinational formula manufacturers to introduce more consistent product platforms across regions. At the same time, interest in cognitive performance, immune support and healthy aging is encouraging suppliers to adapt MFGM-rich ingredients for products beyond early-life nutrition.

Restraints

Commercial expansion is limited by low natural concentrations of MFGM components, uneven recovery yields and the need for tightly controlled dairy streams. Fonterra states that approximately 500 litres of milk are associated with the production of one kilogram of its high-concentration SureStart MFGM Lipid 100 because MFGM phospholipids represent only a small fraction of total milk lipids. Manufacturers also require specialised membrane systems, hygienic separation, microbiological control and gentle drying to protect sensitive proteins and lipids. These factors keep production costs and selling prices significantly above conventional whey protein concentrates, limiting adoption in mass-market formulations and increasing exposure to variations in milk, whey and dairy-energy costs.

Opportunities

The largest incremental opportunities are emerging in adult nutritional powders, ready-to-drink beverages, fermented dairy products and solid-format supplements targeting cognition, mental performance and healthy aging. Milk phospholipid ingredients have neutral sensory characteristics and can be incorporated into a wider range of applications than traditional infant-formula systems, while protein-rich MFGM ingredients can combine bioactive positioning with protein fortification. Asia-Pacific also offers meaningful expansion potential as regulatory access improves and premium infant-formula brands seek stronger nutritional differentiation. China has established an active industry standard for milk fat globule membrane whey protein powder, providing a clearer technical framework for future local product development and commercialisation.

Challenges

The industry faces persistent challenges in product standardisation and direct

performance comparison. Commercial MFGM ingredients differ substantially in protein content, total phospholipids, sphingomyelin, gangliosides, immunoglobulins and lactoferrin, meaning nominally similar products may require different inclusion levels and deliver different functional profiles. Customer qualification is lengthy because infant-nutrition manufacturers assess microbiological safety, stability, sensory effects, regulatory status and clinical substantiation before changing formulations. The market must also manage highly concentrated supply, limited disclosure of dedicated production capacity and uncertainty over how quickly adult functional-nutrition concepts will convert into recurring commercial volumes.

Industry Chain Analysis

The upstream industry consists of milk collection, cheese production, whey processing, cream separation, butter and anhydrous milk-fat manufacturing, together with membrane equipment, extraction media and food-grade processing aids. Sweet cheese whey is the principal raw-material stream for protein-dominant MFGM concentrates, while cream and anhydrous milk-fat processing streams support higher-lipid products. The midstream stage creates most of the market value through selective recovery, filtration, diafiltration, centrifugation, concentration, standardisation and spray drying. Value is determined less by the gross availability of milk than by access to suitable infant-grade dairy streams, the ability to preserve native bioactive components and the capability to deliver stable specifications at commercial scale. Downstream customers formulate these ingredients into infant and young child formula, nutritional powders, beverages, fermented dairy products, nutrition bars, bakery products and solid-dose supplements. Protein-matrix concentrates typically generate the largest volumes, while high-concentration lipid and phospholipid products achieve higher unit values because of lower recovery yields, more intensive processing and smaller inclusion rates.

Segment Insights

Whey protein matrix MFGM concentrates are the largest product segment, representing approximately 79% of estimated global volume in both 2025 and 2026. Their scale reflects the availability of cheese-whey streams, established whey-protein infrastructure and relatively high inclusion levels in infant and young child formula. Products in this category commonly contain around 70% protein, although their phospholipid, immunoglobulin and lactoferrin profiles vary by process and supplier. MFGM lipid concentrates form a smaller but higher-value segment because they deliver more

concentrated complex milk lipids at lower application dosages. Standardised milk phospholipid extracts remain the smallest major segment, but they provide greater formulation flexibility in adult nutritional powders, capsules, tablets and functional foods. Products with insufficiently disclosed composition or custom specifications remain grouped under other qualified MFGM ingredients rather than being forced into narrower classifications.

Downstream Market Opportunities

Infant and young child formula accounts for slightly more than four-fifths of estimated MFGM ingredient demand and remains the principal commercial application. Demand is concentrated in premium formulations positioned around brain development, immunity and closer compositional alignment with human milk. The larger long-term diversification opportunity lies in non-infant applications, particularly nutritional powders, ready-to-drink beverages, fermented dairy products and capsule or tablet supplements. These categories currently account for a smaller share of volume but benefit from broader consumer demographics, fewer formulation constraints than infant nutrition and growing interest in cognitive health and healthy aging. Nutrition bars and bakery products provide additional application channels, although they are likely to remain secondary compared with dairy and beverage formats.

Regional Insights

Europe is the largest production and technology base for Milk Fat Globule Membrane Ingredients, supported by established cheese-whey processing, specialised infant-nutrition ingredient manufacturing and several of the industry's verified core suppliers. Capacity expansion in the Netherlands and new product development in Germany are strengthening the region's supply position. North America is an important production base for whey-derived MFGM concentrates, benefiting from large cheese-processing streams and mature whey-protein infrastructure. New Zealand has a distinctive position in lipid-dominant MFGM ingredients because of its integrated milk, cream and anhydrous milk-fat supply chain. Asia-Pacific represents the most important incremental demand opportunity, supported by premium infant-formula consumption and expanding regulatory access in Thailand and Australia. China, Japan and South Korea have meaningful research, application and downstream formulation activity, but commercial food-grade supply remains more limited than in Europe, North America and New Zealand.

Competitive Landscape Analysis

The verified core competitive landscape comprises nine manufacturers and remains concentrated around European dairy-ingredient specialists, North American whey processors, a leading New Zealand complex-lipid supplier and a Korean milk-phospholipid processor. Competition is based on access to suitable dairy feedstocks, proprietary fractionation processes, preservation of native bioactive components, infant-grade quality systems, regulatory support and the depth of clinical and application documentation. Large integrated dairy groups benefit from secure whey or cream streams and established spray-drying infrastructure, while specialised processors compete through higher phospholipid standardisation and targeted adult-nutrition positioning. Recent investment has focused on expanding dedicated MFGM capacity, improving dry-blend functionality and broadening application portfolios beyond infant formula. The market remains difficult for new entrants because a technically feasible extraction process is insufficient without consistent specifications, commercial-scale manufacturing, food-safety qualification, customer validation and evidence of external B2B sales.

Report Scope

This report studies the global Milk Fat Globule Membrane (MFGM) Ingredients production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Milk Fat Globule Membrane (MFGM) Ingredients total production and demand, 2021-2032, (Tons)

Global Milk Fat Globule Membrane (MFGM) Ingredients total production value, 2021-2032, (USD Million)

Global Milk Fat Globule Membrane (MFGM) Ingredients production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Milk Fat Globule Membrane (MFGM) Ingredients consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Milk Fat Globule Membrane (MFGM) Ingredients domestic production, consumption, key domestic manufacturers and share

Global Milk Fat Globule Membrane (MFGM) Ingredients production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Milk Fat Globule Membrane (MFGM) Ingredients production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Milk Fat Globule Membrane (MFGM) Ingredients production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Milk Fat Globule Membrane (MFGM) Ingredients 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 Arla Foods Ingredients Group P/S, Royal FrieslandCampina N.V., Fonterra Co-operative Group Limited, Hilmar Cheese Company, Inc., Actus Nutrition, DMK Deutsches Milchkontor GmbH, MILEI GmbH, Corman S.A., BK bio, 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 Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Milk Fat Globule Membrane (MFGM) Ingredients Market, Segmentation by Type:

Whey Protein Matrix MFGM Concentrates

MFGM Lipid Concentrates

Standardized Milk Phospholipid Extracts

Other

Global Milk Fat Globule Membrane (MFGM) Ingredients Market, Segmentation by Raw Material Stream:

Cheese Whey Stream

Anhydrous Milk Fat Processing Stream

Milk Phospholipid Feedstock Stream

Other

Global Milk Fat Globule Membrane (MFGM) Ingredients Market, Segmentation by Application:

Infant and Young Child Formula

Nutritional Powders

Ready-to-Drink Nutritional Beverages

Fermented Dairy Products

Nutrition Bars

Bakery Products

Capsule and Tablet Supplements

Other

Companies Profiled:

Arla Foods Ingredients Group P/S

Royal FrieslandCampina N.V.

Fonterra Co-operative Group Limited

Hilmar Cheese Company, Inc.

Actus Nutrition

DMK Deutsches Milchkontor GmbH

MILEI GmbH

Corman S.A.

BK bio

Key Questions Answered

1. How big is the global Milk Fat Globule Membrane (MFGM) Ingredients market?
2. What is the demand of the global Milk Fat Globule Membrane (MFGM) Ingredients market?
3. What is the year over year growth of the global Milk Fat Globule Membrane (MFGM) Ingredients market?
4. What is the total value of the global Milk Fat Globule Membrane (MFGM) Ingredients market?
5. Who are the Major Players in the global Milk Fat Globule Membrane (MFGM) Ingredients market?
6. What are the growth factors driving the market demand?

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