

Global Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients market size was valued at US\$ 399 million in 2025 and is forecast to a readjusted size of US\$ 746 million by 2032 with a CAGR of 8.9% during review period.

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 is a detailed and comprehensive analysis for global Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/kg), 2021-2032

Global Milk Fat Globule Membrane (MFGM) Ingredients market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/kg), 2021-2032

Global Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients

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 Milk Fat Globule Membrane (MFGM) Ingredients 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 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.

Milk Fat Globule Membrane (MFGM) Ingredients 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 Segmentation

Market segment by Type

Whey Protein Matrix MFGM Concentrates

MFGM Lipid Concentrates

Standardized Milk Phospholipid Extracts

Other

Market segment by Raw Material Stream

Cheese Whey Stream

Anhydrous Milk Fat Processing Stream

Milk Phospholipid Feedstock Stream

Other

Market segment 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

Major players covered

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

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)

Chapter Outline

Chapter 1, to describe Milk Fat Globule Membrane (MFGM) Ingredients product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Milk Fat Globule Membrane (MFGM) Ingredients, with price, sales quantity, revenue, and global market share of Milk Fat Globule Membrane (MFGM) Ingredients from 2021 to 2026.

Chapter 3, the Milk Fat Globule Membrane (MFGM) Ingredients competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients 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 Milk Fat Globule Membrane (MFGM) Ingredients.

Chapter 14 and 15, to describe Milk Fat Globule Membrane (MFGM) Ingredients sales channel, distributors, customers, research findings and conclusion.

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