

Global Sialylated Human Milk Oligosaccharides (HMO) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Sialylated Human Milk Oligosaccharides (HMO) market size is expected to reach \$ 441 million by 2032, rising at a market growth of 16.1% CAGR during the forecast period (2026-2032).

In 2025, global Sialylated Human Milk Oligosaccharides (HMO) production reached approximately 802 tons, with an average global market price of around US\$191 per kilogram. Sialylated HMOs are an important type of HMOs, accounting for approximately 13% of total HMOs. 3'-Sialyllactose (3'-SL) and 6'-sialyllactose (6'-SL) are two simplest sialylated HMOs.

The global market for sialylated Human Milk Oligosaccharides (HMOs) is shifting from basic supplementation toward specialized functional nutrition. Synthetic biology breakthroughs have established microbial fermentation as the dominant production route, with domestic pioneers achieving commercial production of synthetic HMO products and breaking previous import dependency. Kyowa Hakko Bio completed an HMO production facility in Thailand in 2022 and began commercial production there; in 2023 it received FDA no-question letters covering 3'-SL and 6'-SL for non-exempt infant formula and conventional foods, and in 2024 its 3'-SL and 6'-SL were already within the EU novel-food authorization framework, indicating that major-market access is opening. As a result, competition is shifting from simple capacity expansion to quality standards, regulatory capability, and supply reliability. Future growth will mainly come from infant nutrition and premium nutrition formulations that seek ingredients closer to human milk, together with broader approved food categories and geographies. At the same time, high purity requirements, complex processing, long approval cycles, cost pressure, and a still-concentrated supply base remain the main constraints. Overall, this segment is likely to expand through high-value, regulation-led, stepwise commercialization rather

than rapid mass adoption.

This report studies the global Sialylated Human Milk Oligosaccharides (HMO) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Sialylated Human Milk Oligosaccharides (HMO) 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 Sialylated Human Milk Oligosaccharides (HMO) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Sialylated Human Milk Oligosaccharides (HMO) total production and demand, 2021-2032, (Tons)

Global Sialylated Human Milk Oligosaccharides (HMO) total production value, 2021-2032, (USD Million)

Global Sialylated Human Milk Oligosaccharides (HMO) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Sialylated Human Milk Oligosaccharides (HMO) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Sialylated Human Milk Oligosaccharides (HMO) domestic production, consumption, key domestic manufacturers and share

Global Sialylated Human Milk Oligosaccharides (HMO) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Sialylated Human Milk Oligosaccharides (HMO) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Sialylated Human Milk Oligosaccharides (HMO) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Sialylated Human Milk Oligosaccharides (HMO) 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 Sialylated Human Milk Oligosaccharides (HMO) 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 Sialylated Human Milk Oligosaccharides (HMO) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Sialylated Human Milk Oligosaccharides (HMO) Market, Segmentation by Type:

3'-Sialyllactose (3'-SL)

6'-Sialyllactose (6'-SL)

Global Sialylated Human Milk Oligosaccharides (HMO) Market, Segmentation by Process:

Microbial Fermentation

Enzymatic Synthesis

Global Sialylated Human Milk Oligosaccharides (HMO) Market, Segmentation by Grade:

Food Grade

Research Grade

Global Sialylated Human Milk Oligosaccharides (HMO) 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 Sialylated Human Milk Oligosaccharides (HMO) market?
2. What is the demand of the global Sialylated Human Milk Oligosaccharides (HMO) market?
3. What is the year over year growth of the global Sialylated Human Milk Oligosaccharides (HMO) market?
4. What is the production and production value of the global Sialylated Human Milk Oligosaccharides (HMO) market?
5. Who are the key producers in the global Sialylated Human Milk Oligosaccharides (HMO) market?
6. What are the growth factors driving the market demand?

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