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Global HMOs Market Growth (Status and Outlook) 2025-2031

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Abstracts

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The global HMOs market size is predicted to grow from US$ 890 million in 2025 to US$ 1800 million in 2031; it is expected to grow at a CAGR of 12.4% from 2025 to 2031.

Human Milk Oligosaccharides (HMO) are a class of complex carbohydrates naturally found in human breast milk. They are composed of multiple sugar units linked by glycosidic bonds. HMOs are one of the most abundant components in human milk after fat, protein, and lactose, and their concentration is significantly higher in human milk compared to other mammals. HMOs play a crucial role in infant health, serving as prebiotics that promote the growth of beneficial bacteria, such as bifidobacteria, helping to establish a healthy gut microbiome and enhance immune system function.

HMOs vary in structure, including monosaccharides, disaccharides, trisaccharides, and longer polysaccharide chains. Different types of HMOs have distinct biological functions, helping to combat pathogen invasion, reduce inflammation, and support brain development. While HMOs are primarily found in human milk, advances in technology have made it possible to extract and synthesize these oligosaccharides through fermentation and chemical processes for use in commercial products like infant formula, functional foods, and health supplements.

With ongoing research into the benefits of HMOs in infant health and other wellness applications, the demand for human milk oligosaccharides has been steadily increasing, particularly in infant formula and adult prebiotic foods.

Market Development Opportunities and Key Drivers:

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As consumer awareness of health increases, especially in regard to infant health, the market for human milk oligosaccharides (HMOs) is experiencing significant growth opportunities. In recent years, extensive research on the role of HMOs in infant health has led more infant formula manufacturers to incorporate HMOs into their products to support immune function and gut health. Additionally, HMOs have shown potential in adult health applications, particularly in maintaining gut microbiome balance and enhancing immune function, opening new growth avenues for the market. As the global population ages and the demand for functional foods rises, there is also growing demand for prebiotic products targeting adults.

Market Risks:

Despite the promising outlook for the HMO market, there are several risks. First, the production of HMOs is complex and costly, which may hinder product accessibility and price competitiveness. Second, the HMO supply chain is intricate, involving multiple stages such as raw material extraction and fermentation. Any technological challenges or disruptions in production could affect the stability of the entire supply chain. Moreover, global regulatory and standard differences may pose challenges to market expansion, particularly in terms of varying regulatory policies and certification requirements in different countries.

Market Concentration:

Currently, the HMO production market is relatively concentrated, with several leading biotech and pharmaceutical companies dominating the industry. These companies have advanced fermentation and biosynthesis technologies that enable large-scale production while maintaining high quality. However, as technology advances and the market expands, more small and medium-sized enterprises are expected to enter the market, fostering competition and innovation.

Downstream Demand Trends:

The downstream demand for HMOs is mainly concentrated in infant formula, prebiotic foods and supplements, and personalized nutrition products. As consumers increasingly demand personalized and functional nutrition products, the market for HMOs as a functional ingredient will continue to grow. Additionally, the potential for HMOs in aging populations is being recognized, particularly for supporting gut health and immune systems in elderly individuals.

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Latest Technologies:

The production technology for HMOs is continually evolving, with innovations in fermentation and biosynthesis reducing production costs. Furthermore, the application of genetic engineering and synthetic biology has opened up possibilities for customized HMO production, allowing for optimized efficiency and yields through genetically modified microorganisms.

LPI (LP Information)' newest research report, the “HMOs Industry Forecast” looks at past sales and reviews total world HMOs sales in 2024, providing a comprehensive analysis by region and market sector of projected HMOs sales for 2025 through 2031. With HMOs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world HMOs industry.

This Insight Report provides a comprehensive analysis of the global HMOs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on HMOs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global HMOs market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HMOs and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global HMOs.

This report presents a comprehensive overview, market shares, and growth opportunities of HMOs market by product type, application, key players and key regions and countries.

Segmentation by Type:

Neutral HMOs

Acidic HMOs

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Segmentation by Application:

- Food Industry
- Laboratory Research

This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France

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UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Abbott

Dupont (Inbiose)

DSM (Glycom)

Chr. Hansen (Jennewein)

BASF

FrieslandCampina

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