

Global Sialylated Human Milk Oligosaccharides (HMO) Market Growth 2026-2032

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Abstracts

The global Sialylated Human Milk Oligosaccharides (HMO) market size is predicted to grow from US\$ 150 million in 2025 to US\$ 442 million in 2032; it is expected to grow at a CAGR of 17.1% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Sialylated Human Milk Oligosaccharides (HMO) Industry Forecast" looks at past sales and reviews total world Sialylated Human Milk Oligosaccharides (HMO) sales in 2025, providing a comprehensive analysis by region and market sector of projected Sialylated Human Milk Oligosaccharides (HMO) sales for 2026 through 2032. With Sialylated Human Milk Oligosaccharides (HMO) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Sialylated Human Milk Oligosaccharides (HMO) industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sialylated Human Milk Oligosaccharides (HMO) 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 Sialylated Human Milk Oligosaccharides (HMO).

This report presents a comprehensive overview, market shares, and growth opportunities of Sialylated Human Milk Oligosaccharides (HMO) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

3'-Sialyllactose (3'-SL)

6'-Sialyllactose (6'-SL)

Segmentation by Process:

Microbial Fermentation

Enzymatic Synthesis

Segmentation by Grade:

Food Grade

Research Grade

Segmentation by Application:

Infant Formula

Food

Others

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

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 analysing the company's coverage, product portfolio, its market penetration.

Novonesis

Inbiose

DSM (Glycom A/S)

Kyowa Hakko Bio

GeneChem Inc.

Elicityl

Zhuhai Langjian Biotechnology

Shanghai HuicH Biotech

Key Questions Addressed in this Report

What is the 10-year outlook for the global Sialylated Human Milk Oligosaccharides (HMO) market?

What factors are driving Sialylated Human Milk Oligosaccharides (HMO) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Sialylated Human Milk Oligosaccharides (HMO) market opportunities vary by end market size?

How does Sialylated Human Milk Oligosaccharides (HMO) break out by Type, by Application?

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