

# **Human Milk Oligosaccharides (HMOs) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Human Milk Oligosaccharides (HMOs) Market Summary**

#### **Introduction**

Human Milk Oligosaccharides (HMOs) are complex carbohydrates found in breast milk, used in infant formula, fortified foods & dietary supplements, medical and therapeutic nutrition, and other applications, valued for their prebiotic and immune-boosting properties. Available in types like 2FL, LNT & LNnT, 3FL, 3SL, 6SL, and others, the market emphasizes purity, bioactivity, and regulatory approval, driven by demand for infant nutrition and gut health solutions. It caters to industries seeking natural ingredients, reflecting a sector shaped by health trends and biotech innovation. Key drivers include rising infant formula demand, gut health awareness, and advancements in fermentation technology.

#### **Market Size and Growth Forecast**

The global HMOs market is estimated at USD 150 to 250 million in 2025, with a CAGR of 6.0% to 7.0% from 2025 to 2030, fueled by infant nutrition and health supplement growth.

#### **Regional Analysis**

**North America:** Holds 30-35% market share, with a growth rate of 5-6%. Growth is driven by infant formula, with the United States leading in demand and Canada focusing on supplements.

**Europe:** Accounts for 25-30% market share, with a growth rate of 5-6%. Demand from Germany and France supports stability, driven by premium nutrition products.

Asia Pacific: Represents 25-30% market share, with a growth rate of 7-8%. China and Japan drive growth with infant formula production.

Rest of the World: Holds 10-15% market share, growing at 6-7%, with Brazil leading due to health trends.

Trends in Europe emphasize quality, while Asia Pacific focuses on scale.

### Application Analysis

Infant formula grows at 6-7%, driven by nutritional mimicry of breast milk, with trends toward HMOs in premium formulas enhancing immunity. Fortified foods & dietary supplements grow at 7-8%, fueled by gut health needs, with trends toward HMOs in functional foods and probiotics. Medical and therapeutic nutrition grows at 5-6%, supporting clinical diets, with trends toward use in immune therapies. Others, like research, grow at 4-5%, with niche demand for bioactive studies.

### Product Type Analysis

2FL grows at 6-7%, favored for its prebiotic effects, with trends toward widespread use in infant formula. LNT & LNnT grow at 7-8%, driven by gut health benefits, with trends toward premium nutrition products. 3FL, 3SL, 6SL, and others grow at 5-6%, supporting diverse applications, with trends toward specialized therapeutic uses.

### Key Market Players

DSM-Firmenich: A leader in nutrition, DSM-Firmenich offers HMOs for infant formula and supplements. Known for its high-quality, innovative solutions, it serves global markets.

Kyowa Hakko: Kyowa Hakko provides HMOs for health applications. It excels in delivering bioavailable, pure products for infant nutrition.

Chr. Hansen: Chr. Hansen supplies HMOs for fortified foods and formula. Known for its sustainable, high-performance solutions, it supports global industries.

These companies compete on purity, bioactivity, and cost, driving the market through innovation.

### Porter's Five Forces Analysis

The threat of new entrants is moderate due to biotech barriers. Substitutes are medium, with synthetic prebiotics competing. Buyer power is medium, with formula makers negotiating. Supplier power is moderate due to fermentation inputs. Rivalry is high, pushing quality and scalability.

### Market Opportunities and Challenges

#### Opportunities

Rising infant formula demand boosting HMOs use.

Advancements in fermentation technology.

Expansion into emerging gut health markets.

Challenges

High production costs limiting adoption.

Regulatory complexities for health claims.

Market saturation in developed regions requiring innovation.

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