

Disposable Baby Products - US - April 2013

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“Economic circumstances and falling birth rates are decreasing product demand; private label is competitive; and parents are shopping online for deep discounts. Market players will need to better compete with private label and expand the category while retailers will need to convince parents to return to shopping in stores.”

– Gabriela Mendieta, Home & Personal Care Analyst

In this report we answer the key questions:

- Branded products, specifically diapers and training pants, are struggling to compete with private label. How can brands better differentiate products in order to recapture sales and market share?
- Difficult economic circumstances and falling birth rates have had a negative impact on this category. How can market players grow the market beyond waiting for economic recovery?
- Online retailers are becoming a greater force in the market. What can traditional retailers do to convince parents to come back to stores?

The U.S. disposable baby product market was strongly impacted by the onset of the recession in 2008 and the overall market has seen flat to declining sales for the past few years. In 2012, total U.S. retail sales for disposable baby products are \$7.5 billion, which is nearly unchanged from the sales observed in 2007, reflecting the market's stagnant performance. Difficult economic circumstances have resulted in financially strapped parents developing an economizing mindset along with declining fertility and birth rates resulting in a decreased demand for disposable baby products.

The performance of the overall market is also strongly dictated by how the disposable diapers and training pants segment performs. Premium diaper brands have struggled to compete with private label, whose quality has improved significantly. However, there are a few bright spots in the market. The baby wipes/moist towelettes and baby care needs segments have both boasted strong sales growth, and Mintel expects that upward progression to continue. Parents are investing in their babies' and toddlers' personal care routines, particularly on products that come into direct contact with their children's skin.

For this market to return to prerecession growth levels, economic recovery will be important because economic circumstances impact both product demand and parents' shopping behaviors. It will also be important that market players focus on product innovation in order to convince parents to trade up to premium brands as a means to reinvigorate sales, which will be especially important in the disposable diapers and training pants segment. Companies and brands could also consider developing new types of disposable baby products to expand the market beyond the current product set and to offer parents greater ease and convenience of caring for their babies and toddlers.

This report analyzes U.S. sales performance of disposable baby product sales in the past five years, the market forecast through 2017, and how different factors, such as a baby personal care and disposable diaper claims, influence consumer shopping behaviors. Household usage, product purchase incidence, information sources that inform product and brand decisions, parents' current frustrations with disposable diapers, and attitudes toward disposable baby products are also explored in this report.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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