

## Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"While the baby and toddler food market stagnated in 2016, there is opportunity in products that can leverage healthier attributes that appeal to parental expectations. Although the nation's birthrate is in slight decline, parents waiting until later in life to have children provide a marketplace with spending power. Brands can leverage claims relating to organic, natural, and healthy."  
**- Billy Roberts, Senior Food & Drink Analyst**

This report looks at the following areas:

- **Baby/toddler food sales stagnate**
- **Allergen fears weigh on parents**
- **Birthrates rise among older mothers**

### Definition

This Report builds on the analysis in Mintel's Feeding Babies and Toddlers – US, February 2016, Baby Food and Drink – US, May 2014, as well as the May 2013, June 2012, May 2011, May 2010, January 2009, and January 2008 Reports of the same title.

This Report includes powdered, ready-to-feed, and concentrated canned baby formula. It also includes canned and jarred baby food (including shelf-stable and frozen/refrigerated products), cereal, and snacks, as well as baby juice.

Not included are other foods that babies consume such as fruit, non-baby-specific juice, or non-baby-specific canned or jarred products that may be eaten by consumers of all ages (eg "regular" apple sauce or cereal, "regular" juice).

For the purposes of this Report, babies are children younger than 1, and toddlers are aged 1-2 years.

**BUY THIS  
REPORT NOW**

**VISIT:**  
store.mintel.com

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
reports@mintel.com

### DID YOU KNOW?

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

# Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Baby/toddler food sales stagnate

Figure 1: Total US sales and fan chart forecast of market, at current prices, 2011-21

Allergen fears weigh on parents

Figure 2: Opinions of baby/toddler food, any agree, by age of parent, December 2016

Birthrates rise among older mothers

Figure 3: Birthrates, by age of mother, United States, 2007, 2014, and 2015

The opportunities

Parents avoiding artificial

Figure 4: Attributes of baby/toddler food, by age of parent, any rank, December 2016

What parents want

Figure 5: Attributes of baby/toddler food, by age of parent, any rank, December 2016

Superfruit could boost already nutritious baby foods

Figure 6: Opinions of baby/toddler food, any agree, by age of parent, December 2016

What it means

### The Market – What You Need to Know

Baby/toddler food sales stagnate

Formula leads market share

Parents' allergy awareness remains strong

Lifestyle changes impacting baby/toddler food market

### Market Size and Forecast

Baby/toddler food sales stagnate

Figure 7: Total US sales and fan chart forecast of market, at current prices, 2011-21

Figure 8: Total US retail sales and forecast of baby/toddler foods, at current prices, 2011-21

### Market Breakdown

Formula maintains market share dominance

Figure 9: Total US retail sales and forecast of baby/toddler foods, by segment, at current prices, 2011-21

Supermarket share continues to slip

Figure 10: Total US retail sales of baby/toddler food, by channel, at current prices, 2011-16

Figure 11: Total US retail sales of baby/toddler food, by channel, with % change, 2011-16

### Market Perspective

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Allergen impact significant but could lessen

Figure 12: Opinions of baby/toddler food, any agree, by age of parent, December 2016

## Formula's supplemental potential

### Market Factors

#### Changes in lifestyles and gender roles impact the American family

##### Birthrates rise among older mothers

Figure 13: Birthrates by year, 2006-15

Figure 14: Birthrates, by age of mother, United States, 2007, 2014, and 2015

##### Delaying major milestones

Figure 15: Parents with children under age 18 in the household, by living arrangement, 2007-16

##### Median income climbs, while the gender gap narrows slightly

Figure 16: Median household income, in inflation-adjusted dollars, 2005-15

### Key Players – What You Need to Know

Abbot increases, while other major entities largely decline

Organic avoids artificial

Organic options fare well in formula

Whole lot of interest in whole grains

### Sales of Baby Food and Drink

Abbot posts category's most notable sales increase in 2016

#### Sales of baby food and drink

Figure 17: MULO sales of baby food and drink, by leading companies, 52-weeks ending Oct. 20, 2016, with % change in year-on-year sales in parentheses

Figure 18: MULO sales of baby food and drink, by leading companies, rolling 52 weeks 2015 and 2016

### What's Working?

#### Organic claims speak to parents avoiding artificial

Figure 19: Baby/toddler food launches, by claim, 2012-16

Figure 20: GMO-free baby/toddler food launches, 2016

#### Retaining consumption throughout toddler years and even into adulthood

Figure 21: Pedialyte launches, 2016

### What's Struggling?

Formula struggles, though organic options fare better

Figure 22: Formula launches, 2016

### What's Next?

#### Free-from claims emerging

Figure 23: Allergen-free toddler food launches, 2016

#### Whole-grain promise with other attributes

Figure 24: Toddler food launches with whole grains, 2016

Private label products leveraging organic, health claims

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 25: Private label/branded baby/toddler food launches, by claim, 2012-16

Figure 26: Private label toddler food launches, 2016

## The Consumer – What You Need to Know

Younger parents more likely to turn to mass merchandisers

Online may emerge as significant resource

Cereals, jarred baby food in need of flavor

Non-artificial interest strong

Significant allergy-related fears among parents

Convenience and on-the-go resonate strongly with parents

## Purchase Location for Baby/Toddler Food

Mass merchandisers emerge as retailer of choice for young parents

Figure 27: Purchase location, December 2016

Supermarket usage trailing notably among younger parents

Figure 28: Purchase location, by age of parent, December 2016

Stronger club appeal among older parents

Figure 29: Purchase location, by age of parent, December 2016

Natural/specialty stores catering to more-affluent consumers

Figure 30: Purchase location, by household income, December 2016

Urban appeal for natural/specialty chains

Figure 31: Purchase location, by area, December 2016

Hispanic parents slightly more likely to turn to specialty stores

Figure 32: Purchase location, by Hispanic origin, December 2016

## Purchase via Online/Subscription

Young consumers predisposed to buying online

Figure 33: Purchase location, by age of parent, December 2016

Black consumers could use online resources for baby food more

Figure 34: Purchase location, by race, December 2016

Figure 35: Frequency of grocery shopping online by Black consumers, by presence of children in household, August 2015

Online potential for underserved areas

Figure 36: Purchase location, by area, December 2016

## Improving Baby/Toddler Food

General content with flavor options of baby/toddler foods

Figure 37: Baby/toddler food improvement, December 2016

Hispanic non-Millennials seeking more diverse baby/toddler cereals

Figure 38: Baby/toddler food improvement, by Hispanic origin, December 2016

## Purchase Drivers

Real interest in non-artificial

Figure 39: Attributes of baby/toddler food, any rank, December 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Seeking added benefits in baby/toddler food

Figure 40: Attributes of baby/toddler food, by age of parent, any rank, December 2016

## Artificial an issue with Hispanic parents

Figure 41: Attributes of baby/toddler food, by Hispanic origin, any rank, December 2016

## Certain factors less of an issue for Hispanic non-Millennial parents

Figure 42: Attributes of baby/toddler food, by Hispanic origin, any rank, December 2016

## Health-related Opinions of Baby Food

### Allergen fears notable among parents

Figure 43: Opinions of baby/toddler food, any agree, by age of parent, December 2016

### Superfruit could boost already nutritious baby foods

Figure 44: Opinions of baby/toddler food, any agree, by age of parent, December 2016

### Calorie concerns may echo bigger fears

Figure 45: Opinions of baby/toddler food, any agree, by area, December 2016

### Sugar concerns weighing on Hispanic non-Millennials

Figure 46: Opinions of baby/toddler food, any agree, by Hispanic origin, December 2016

## Purchasing Baby/Toddler Food

### Parents seeking nutritional guidance

Figure 47: Opinions of baby/toddler food, any agree, by generation, December 2016

### Need to accentuate foods' safety

Figure 48: Opinions of baby/toddler food, any agree, by area, December 2016

### Black consumers appear more trusting of national brands for guidance

Figure 49: Opinions of baby/toddler food, any agree, by race, December 2016

### Safety fears factor prominently among Hispanic parents

Figure 50: Opinions of baby/toddler food, any agree, by Hispanic origin, December 2016

## Feeding Babies/Toddlers

### Parents want options to ease dining out

Figure 51: Opinions of baby/toddler food, any agree, by generation, December 2016

### Asians seeking packaged options only for away-from-home needs

Figure 52: Opinions of baby/toddler food, any agree, by race, December 2016

### Hispanic parents appreciate scheduled feeding times

Figure 53: Opinions of baby/toddler food, any agree, by Hispanic origin, December 2016

## Opportunities for Baby/Toddler Foods

### Time concerns pressing parents

Figure 54: Baby/toddler food opportunities, December 2016

### Organic's price may weigh heavily on older parents

Figure 55: Baby/toddler food opportunities, by household income, December 2016

### Expanding toddler food's appeal

Figure 56: TURF Analysis – Baby/toddler food opportunities, December 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Baby Food & Drink/Feeding Babies & Toddlers - US - March 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Appendix – Data Sources and Abbreviations

Data sources  
 Sales data  
 Fan chart forecast  
 Consumer survey data  
 Consumer qualitative research  
 Abbreviations and terms  
 Abbreviations

## Appendix – Market

Figure 57: Total US retail sales and forecast of baby/toddler food, at inflation-adjusted prices, 2011-21  
 Figure 58: Total US retail sales of baby/toddler food, by segment, at current prices, 2014 and 2016  
 Figure 59: Total US retail sales and forecast of baby formula, at current prices, 2011-21  
 Figure 60: Total US retail sales and forecast of baby formula, at inflation-adjusted prices, 2011-21  
 Figure 61: Total US retail sales and forecast of baby food and snacks, at current prices, 2011-21  
 Figure 62: Total US retail sales and forecast of baby food and snacks, at inflation-adjusted prices, 2011-21  
 Figure 63: Total US retail sales and forecast of baby electrolytes, at current prices, 2011-21  
 Figure 64: Total US retail sales and forecast of baby electrolytes, at inflation-adjusted prices, 2011-21  
 Figure 65: Total US retail sales and forecast of baby juice, at current prices, 2011-21  
 Figure 66: Total US retail sales and forecast of baby juice, at inflation-adjusted prices, 2011-21  
 Figure 67: Total US retail sales of baby/toddler food/drink, by channel, at current prices, 2014 and 2016  
 Figure 68: US supermarket sales of baby/toddler food/drink, at current prices, 2011-16  
 Figure 69: US drugstore sales of baby/toddler food/drink, at current prices, 2011-16  
 Figure 70: US sales of baby/toddler food/drink through other retail channels, at current prices, 2011-16

## Appendix – Key Players

Figure 71: MULO sales of baby formula, by leading companies and brands, rolling 52 weeks 2015 and 2016  
 Figure 72: MULO sales of baby food and snacks, by leading companies and brands, rolling 52 weeks 2015 and 2016  
 Figure 73: MULO sales of baby electrolytes, by leading companies and brands, rolling 52 weeks 2015 and 2016  
 Figure 74: MULO sales of baby juice, by leading companies and brands, rolling 52 weeks 2015 and 2016

## Appendix – TURF Analysis Methodology

Figure 75: Table - TURF Analysis – Baby/toddler food opportunities, December 2016

**BUY THIS  
 REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)