

Pregnancy and Health - US - August 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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



"The US continues to experience low birth rates. Despite this, pregnancy specific products that address the nutritional and physical needs of pregnant women continue to roll out. Pregnancy related attitudes and ailments will drive the need for functional products that can give women the peace of mind they are doing the best for their growing child."

- Marissa Gilbert, Sr Health & Wellness Analyst

This report looks at the following areas:

- **Baby bust continues, decreasing the size of the prenatal care market**
- **Pregnancy isn't always blissful**
- **Women worry about meeting their nutritional needs**

As no two pregnancies are alike, the desire for customized products will drive the market forward while creating opportunities for companies to expand product lines and product usefulness to cover pregnancy as well as pre- and postnatal health.

**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

Pregnancy and Health - US - August 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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 bust continues, decreasing the size of the prenatal care market

Figure 1: US annual births, 2006-16

Pregnancy isn't always blissful

Figure 2: Undesirable pregnancy feelings, May 2017

Women worry about meeting their nutritional needs

Figure 3: Concern not eating enough of the right foods, May 2017

The opportunities

Moms-to-be aged 35+ are a key market for pregnancy specific products and services

Figure 4: Products willing to pay for, by age, May 2017

Address health needs during pregnancy with functional foods and drinks

Figure 5: Prenatal products willing to pay for, May 2017

Extend the life of brands and products: address pre-, during, and postnatal needs

Figure 6: Took a prenatal multivitamin before getting pregnant, by age, May 2017

What it means

The Market – What You Need to Know

Moderate growth projected for female population in “childbearing years”

Number of US births declines; boost among women 30+ not enough

White, non-Hispanic female population contributing most to baby bust

Planned pregnancies increase

Market Factors

Number of women in “childbearing years” increasing, but not as much as total female population

Figure 7: Female population, by age, 2012-22

Boost among older moms not enough to lift overall number of US births

Figure 8: US annual births, 2006-16

Figure 9: Number of total births, by female age, 2015-16

White female share of US population declining; segment also contributing most to baby bust

Figure 10: Female population, by race and Hispanic origin, 2012-22

Figure 11: Number of total births, by female race and Hispanic origin, 2007-16

Market Perspective

Women are planning their families

Figure 12: Current use of select contraceptive methods, Among women 15-44 years of age, 2002-15

**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

Pregnancy and Health - US - August 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 13: Percentage of births in the 5 years before the interview that were intended, mistimed, or unwanted at conception, Among women 15-44 years of age, 2006-15

Key Players – What You Need to Know

- Prenatal vitamins surge, authenticity is needed, and caffeine alternatives perk up tired moms
- High costs and mental health are key concerns
- Focus on innovating for all phases of maternal health

What's Working?

- Increasing variety of prenatal vitamin brands gaining success
Figure 14: MULO sales of select prenatal vitamin brands, 2014-16
- Building an authentic brand to gain the trust of moms
- Prenatal caffeine restriction lends opportunity for substitutes

What's Struggling?

- The high cost of prenatal vitamins
- Mental wellbeing is essential to a healthy mom and baby

What's Next?

- Growth potential in targeting specific health needs
Figure 15: Prenatal products willing to pay for, May 2017
- Custom prenatal vitamins reflect need for personalization
- Wearable devices offer peace of mind
- Bump Boxes subscription puts new products in the hands of women
- Conception helpers
- Maternal healthcare doesn't end at birth: lactation and first year support a growing essential

The Consumer – What You Need to Know

- Pregnancy is a tiring, but happy experience
- Women claim clear nutritional knowledge during pregnancy
- Most take a prenatal vitamin, many in anticipation of pregnancy
- Women are exercising during pregnancy, mainly at home
- Pregnancy app requirements are impacted by pregnancy stage
- Pregnancy motivates spending on related goods and services

Self-perceptions

- Women describe pregnancy as a tiring, but happy experience
Figure 16: Pregnancy self-perceptions, May 2017
Figure 17: TURF analysis – Pregnancy self-perceptions – May 2017
- Methodology
- Pregnancy is overwhelming for young, less supported, and first timers
Figure 18: Pregnancy self-perception – Overwhelmed, by age, household income, current marital status, and mom experience, May 2017
- Midwest mamas claim to be most uncomfortable
Figure 19: Pregnancy self-perception – Uncomfortable, by age and census region, May 2017

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

Pregnancy and Health - US - August 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Age brings on better body intuition

Figure 20: Pregnancy self-perception – In tune with my body, by age, May 2017

First time moms join the club; yet the youngest moms don't feel included

Figure 21: Pregnancy self-perception – Feel like part of the "club," by age and mom experience, May 2017

Pregnancy comes with challenges, but is so worth it

Pregnancy Nutrition Perceptions

Women believe they are on top of their nutritional needs

Figure 22: Pregnancy nutrition perceptions, May 2017

Figure 23: Pregnancy nutrition perceptions – Agree, by age and Hispanic origin, May 2017

Nutritional changes are commonplace during pregnancy

Figure 24: Pregnancy nutrition modifications, May 2017

Figure 25: Pregnancy nutrition modifications – Agree, by age, May 2017

Women in their first trimester most focused on nutritional behaviors

Figure 26: Pregnancy nutrition perceptions – Agree, by pregnancy trimester May 2017

Some nutritional changes are needed, but women aren't fazed

Prenatal Vitamins

Most take a prenatal vitamin, many in anticipation of pregnancy

Figure 27: Prenatal vitamin usage behaviors, May 2017

Figure 28: Prenatal vitamin usage behaviors, by age and Hispanic origin, May 2017

Prenatal vitamin formats and formulations taken into consideration

Figure 29: Prenatal vitamin format and formulation attitudes, May 2017

Figure 30: Prefer vegetarian prenatal multivitamins, by age and race, May 2017

Older moms seek additional nutritional boosts during pregnancy

Figure 31: Additional vitamins and supplements taken during pregnancy, by age, May 2017

Certain self-perceptions linked to prenatal vitamin attitudes and usage

Figure 32: Prenatal vitamin attitudes and usage, by pregnancy self-perceptions indexed to total, May 2017

Fitness

Women are exercising during pregnancy; mainly at home

Figure 33: Fitness behaviors during pregnancy, May 2017

Figure 34: Any do/will do (net) – Fitness behaviors during pregnancy, by age and household income, May 2017

Low impact workouts are the focus for most pregnant women

Figure 35: Types of workouts done during pregnancy, May 2017

Figure 36: Types of workouts done during pregnancy (net), by age, household income, and area, May 2017

Women seek out fitness gear during pregnancy

Figure 37: Fitness gear purchase behavior, May 2017

Figure 38: Fitness gear purchase behavior (net), by age and household income, May 2017

Engage women early in fitness during pregnancy

Figure 39: Fitness behaviors, by pregnancy trimester, May 2017

**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

Pregnancy and Health - US - August 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Keeping added "baby weight" down motivates; lack of energy deters exercise

Pregnancy App Features

Weekly baby updates are a must, as is continuing usefulness of the app

Figure 40: Pregnancy app features, by rank, May 2017

App requirements change throughout pregnancy

Figure 41: Pregnancy app features, any rank, by pregnancy trimester, May 2017

Information gathering is more important to first time moms

Figure 42: Pregnancy app features, any rank, by mom experience, May 2017

Products Willing to Pay For

Pregnancy motivates spending on related goods and services

Figure 43: Products willing to pay for, May 2017

Older and more affluent women willing to pay for pregnancy products

Figure 44: Products willing to pay for, by age and household income, May 2017

Self-perceptions align with products willing to pay for

Figure 45: Select pregnancy self-perceptions, by products willing to pay for, May 2017

Meal delivery services appeal at the beginning and end of pregnancy

Figure 46: Willingness to pay for meal delivery services, by trimester, May 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Appendix – The Consumer

Figure 47: Table – TURF analysis – Pregnancy self-perceptions – May 2017

Figure 48: Table – TURF analysis – Products willing to pay for, May 2017

**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