

Disposable Baby Products - US - 2023

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

- Changes in DBP purchases in response to high inflation
- Sustainable disposable diaper innovation
- The importance of skin health claims within the baby personal care category
- Important attributes parents consider when purchasing baby personal care products
- Impact of falling birthrates on the DBP market

The DBP (disposable baby product) market is experiencing a division in parental preferences driven by the purchasing behaviors of financially comfortable and financially struggling parents. Higher-income parents are increasingly opting for premium, sustainable DBPs while lower-income parents are trading down to private label brands in response to high inflation. 26% of financially healthy parents purchase premium disposable diaper/training pant brands while 32% of parents who describe their financial situation as tight, struggling or in trouble purchase private label disposable diaper/training pant brands.

Mid-tier DBP brands risk losing market share as parents increasingly trade up and trade down, reflecting the challenge of providing parents value while also catering to parents' interest in products such as environmentally friendly diapers and clean-label baby personal care products.

Increased interest in skin health claims within the baby personal care category indicates opportunities for the development of clean-label products that feature skin-healthy ingredients, as well as products that take a preventative approach to skin health, such as products with SPF ingredients or those that offer medical benefits (eg prevents eczema). This opportunity is especially apparent within the private label baby personal care segment, as many of these products lack trending skin health claims. Premium private label baby



“This market bifurcation leaves mid-tier brands at risk of being stuck in the middle and indicates the need for large mid-tier brands to provide parents value while also creating premium DBP line extensions and new brands that appeal to financially comfortable parents.”

– **Caleb Bryant, Associate Director of Food and Drink Reports**

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personal care products are therefore a key whitespace opportunity given parents' interest in value *and* skin healthy ingredients.

The declining birthrate will challenge the DBP market as total volume will sales decline. However, the development of higher-priced premium, environmentally friendly DBP products can compensate for volume losses, as parents pay more for DBPs that align with their interest in sustainability, product performance and clean ingredient labels.

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