

BABY FOOD AND DRINK – US – 2024

Babies and toddlers have specific nutrition needs, and feeding them can be stressful. Help parents navigate, and be an invaluable resource as babies grow into kids.



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Baby Food And Drink - US - 2024

This report looks at the following areas:

- Food and drink consumed by children under 3
- Frequency of foods consumed by children under 3
- Important attributes of food and drinks given to babies/toddlers
- Sources of information about baby/toddler nutrition
- Toddler and baby feeding behaviors
- Attitudes toward baby/toddler food and drink



Babies and toddlers have specific nutrition needs, and feeding them can be stressful. Help parents navigate, and be an invaluable resource as babies grow into kids.

Overview

Brands have a big opportunity to become the go-to brand for babies and toddlers, as the smallest members of the family are often the most routine-driven, and their parents tend to be brand loyal. That said, choosing a brand to bestow loyalty on can be fraught. 76% agree brands have a role to play in educating parents about nutrition, making knowledge a clear point of entry for brands. Tying nutritional claims to health outcomes and developmental stages can help parents understand what products fit the needs of their babies. For formula products, brands can be even more granular, as these products could be the sole source of nutrition for a child.

Parents across demographics are under pressure, though their individual pain points depend on the specific structure of their lives. Marital status matters, as does geographic location and work-from-home (WFH) status. That said, baby/toddler food and drink that delivers nutrition from vegetables, fruits and protein sources are particularly sought after.

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Luckily for brands, parents are practical: they understand good products may cost more, and are willing to pay (within reason). The burden, then, is proving claims and boosting products with an edge of ease and convenience.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Food and drink consumed by children under 3

- Milk: it does the babies (and toddlers) good
 - Graph 1: food and drink consumed by children under 3, 2023
- Giving parents clarity helps them focus on the littlest family members
- Make ends worth the means
 - Graph 2: food and drink consumed by children under 3, by region, 2023
- Finances push consumers to homemade options
 - Graph 3: food and drink consumed by children under 3, by financial situation, 2023
- Cooking, shopping and even discovery are impacted by work
 - Graph 4: food and drink consumed by children under 3, employment situation, 2023
- Co-parent to win over singles
 - Graph 5: food and drink consumed by children under 3, marital status, 2023

Frequency of foods consumed by children under 3

- Kids thrive on routine; thus, so do parents
 - Graph 6: frequency of food and drink consumed by children under 3, 2023

Important attributes of drinks given to babies/toddlers

- Consumers will get more choosy as prices climb
 - Graph 7: important attributes in drinks given to babies/toddlers, 2023
- Get pediatricians on board to boost brand profile
 - Graph 8: important attributes in drinks given to babies/toddlers, by region, 2023
- Brands are a shortcut to decision-making

Important attributes of food given to babies/toddlers

- Nutrition can justify price, while brand offers value in terms of quality, reliability and trust
 - Graph 9: important attributes in food given to babies/toddlers, 2023

- Flexible schedules may insulate brands from price-driven decisions
 - Graph 10: important attributes in food given to babies/toddlers, by employment situation, 2023

Sources of information about baby/toddler nutrition

- Parents want to lean on personal relationships
 - Graph 11: resources used for feeding children, 2023
- Don't let single parents make feeding decisions by themselves
 - Graph 12: resources used for feeding children, by marital status, 2023
- Vary resources for education to reach the masses
 - Graph 13: resources used for feeding children, by region, 2023

Toddler and baby feeding behaviors

- Parents will pay for nutrition
 - Graph 14: toddler and baby feeding behaviors, US
- Parents have more motivation than picky eating
 - Graph 15: toddler and baby feeding behaviors by region, 2023
- Single parents are struggling more, but not finding relief in current product mix
 - Graph 16: toddler and baby feeding behaviors, by marital status, 2023

Attitudes toward baby/toddler food and drink

- Consumers hold a higher standard for kids' food and drink
 - Graph 17: attitudes about feeding babies/toddlers, 2023
- Parents agree: feeding is stressful, overwhelming, and they're asking for help!
 - Graph 18: attitudes about feeding babies/toddlers, by region, 2023
- Married parents are stressed
 - Graph 19: attitudes about feeding babies/toddlers, by marital status, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Formula brand grabs its passport
- A2 formulations boast easy digestion, even for the littlest bellies
- Eating veggies gets a lot more delicious
- Fill up the sippy cups with something just for them

Marketing and advertising

- Carefully consider associations for baby food
- Plant-based products need extra reassurance
- Sell consumers on ease to bridge the gap between ready-to-use and powder
- Take a page from the baby-led-weaning crowd

- Not even Peppa can overcome price ceilings

Opportunities

- Gather the usual suspects
- Opportunity to provide for toddlers is stymied by bad press

THE MARKET

Market context

Market drivers

- Wages have outpaced prices since last May – the first time in over two years
 - Graph 20: wages and CPI, percent change from year ago, 2021-23
- Contamination reports cause confusion
- Formula shortage gets federal attention
- Cost of formula creates sticker shock

Market size and forecast

- Retail sales and forecast of baby/toddler food and drink

Market segmentation

- Necessity-driven market has floor, and ceiling, without baby boom
 - Graph 21: total retail sales and forecast, by segment, at current prices, 2018-28
- Retail sales of baby/toddler food and drink, by segment

Market share/brand share

- Abbott recovers, but can't eclipse market leader
- Sales of baby formula, by company
- Gerber drops below 50% market share
- Sales of baby food, snacks & juice, by company
- Abbott dominates baby hydration
- Sales of baby electrolytes, by company

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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