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The baby feeding category faces a structural challenge as birth rates continue to decline, contributing to overall category softness. However, growth opportunities exist within specific product attributes that align with evolving consumer priorities.



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The takeaway...

- Category Decline: Lower birth rates have led to sustained declines across major baby feeding segments.
- Emerging Growth Drivers: Despite overall softness, products featuring claims such as no added sugar, probiotics, Made in the USA, and hormone-free are outperforming the trend.
- Strategic Implication: These attributes signal a shift toward health-conscious, transparent, and premium positioning creating a pathway for manufacturers to capture share and drive incremental growth.

Your next move...

- Innovate and invest in differentiated offerings that emphasize these high-performing claims to stay competitive in a challenged category.

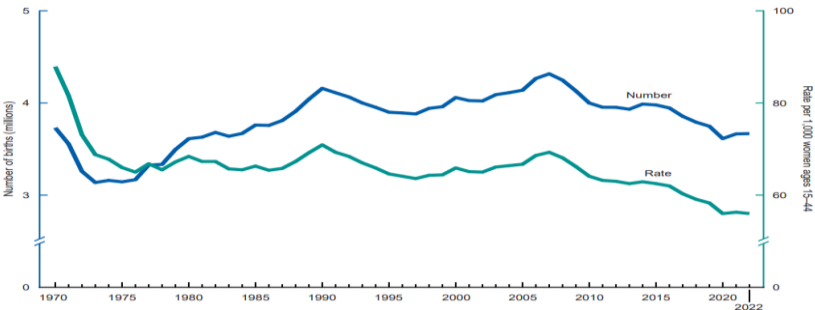
# Challenged baby feeding category has pockets of growth

## Find growth by shifting focus to attributes consumers demand

### Births and Birth Rates Decline

Declining birth rates create a natural challenge for baby feeding products, increasing the need for manufacturers to identify new growth opportunities.

Live births and general fertility rate: United States, 1970–2022

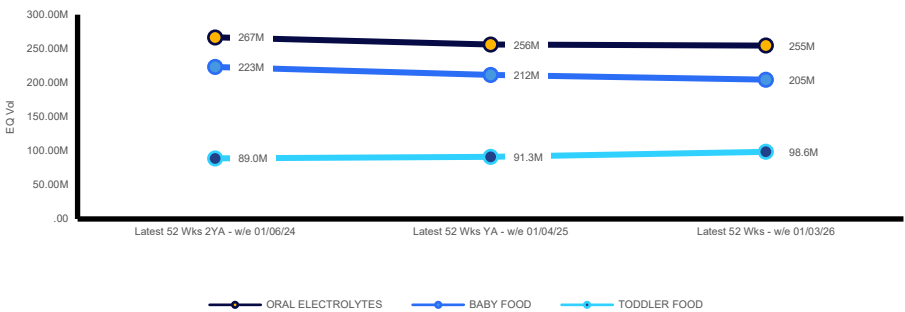


NOTE: Rate for 2020 has been revised and differs from that published in "Births: Final Data for 2020."  
SOURCE: National Center for Health Statistics, National Vital Statistics System, natality data file.

### Major segments weigh on category growth

Birth rate declines have had an impact on the performance of baby feeding products with the major segments

Baby Feeding Segments EQ Vol Sales



Source: NIQ, Total US Full View (Modeled) + Conv + Pet Retail + Costco (Model) + Rem Accounts

### Outsized growth is occurring with products using certain claims

Although overall baby feeding sales are declining, certain package claims are capturing consumers' attention. Features like no added sugar, probiotics, U.S. origin, and hormone-free are outperforming the trend, highlighting shifting consumer priorities and new growth opportunities for brands.

Stated Attributes on Baby Feeding Packages

|                     | Unit Decline | Unit Growth |
|---------------------|--------------|-------------|
| No Sugar Added      |              |             |
| Contains Probiotics |              |             |
| Made in USA         |              |             |
| Free From Hormones  |              |             |
| Contains Superfood  |              |             |
| Non-GMO             |              |             |

SOURCE: NIQ Product Insight | Baby Feeding; Total US xAOC, Latest 52 Wks - w/e 11/29/25

Industry Analysis Sources:  
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