

Babies & Toddlers: Current trends and innovations



March 2022

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1. Introduction





The present consumer and market report, titled “**Babies & Toddlers: European market, consumer trends, and innovation**”, provides an analysis of the babies and toddlers sector, with a special focus on health. The geographical scope of the report is Europe, spotlighting the Atlantic Area countries (France, Ireland, Portugal, Spain, and United Kingdom). In the report, the production, value and volume of sales of the sector, as well as product launches, main positionings, consumer trends and market health claims were evaluated. The main information sources have been Innova Database, Innova Markets Insights, GlobalData, and European Commission databases, among others.

The following categories have been analysed: Baby formula/milk, Baby solid food, Baby drinks, and Other baby food. The Baby Solid Food category includes the following subcategories: Baby Cereals & Biscuits, Baby Fruit Products Desserts & Yogurts, Baby Meals, Baby Snacks. Other Baby Food includes any baby food that does not fall under the above subcategories. Baby sauces for pasta, dry pasta for babies, dry rice grains, baby cheese, plain cottage cheese, baby food dressings, glucose and sweetening fruit powders for baby, bakery mixes for babies have all been included in this category included in this subcategory. Regarding the subcategory Baby Cereals & Biscuits, often the word instant cereal has been mentioned.

The present report is part of a series of “consumer, market and innovation reports” that represent one of the several innovation support services for SMEs implemented in the scope of the project “**AHFES - A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs**”. The aim of this service, delivered by the Galician Food Cluster (Clusaga), is to provide to Atlantic Area SMEs working in the healthy food segment with information and knowledge helpful to guide their strategies within a specific market sector or country, as well as for the preparation of their product or commercial strategies.

AHFES: A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs

AHFES (*Atlantic Healthy Food EcoSystem*) is a European project funded by the Interreg Atlantic Area programme. The purpose of AHFES is to improve the overall competitiveness and growth of SMEs in the value chain of healthy food & lifestyles by contributing to enhancing a transnational innovation ecosystem that helps SMEs access knowledge, partners and markets and align their products and services to consumer needs and expectations.

Throughout the project duration (from March 2019 to August 2022), AHFES will deliver the following outputs:

- Intelligence gathering on current consumer trends regarding healthy food and lifestyles
- Mapping of the Atlantic Area healthy food and lifestyles innovation ecosystem
- Facilitation of networking and support in building transnational innovation partnerships
- Innovation training actions for SMEs
- Services tailored to SME needs

AHFES is implemented by the following organisations:



2. The Market

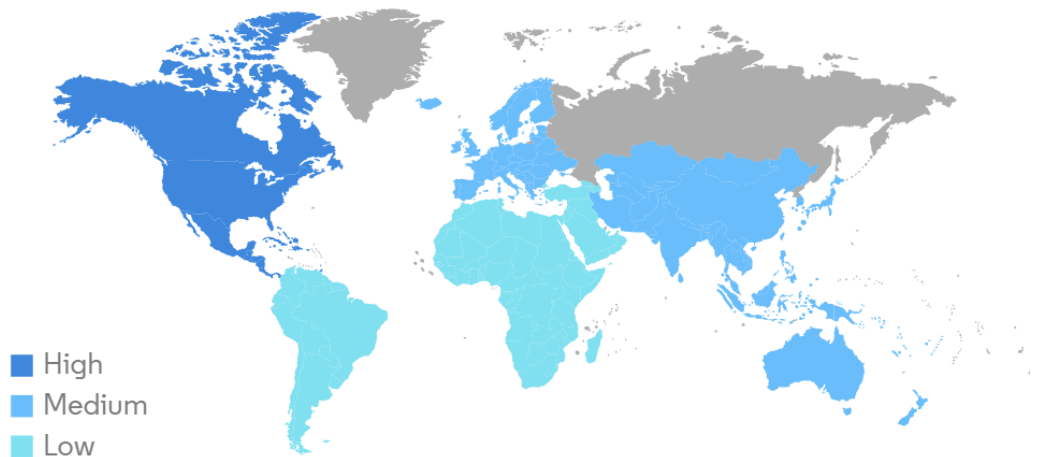


Baby foods are primarily designed to meet the nutritional needs of infants and children aged 0 to 36 months. In 2021, the global infant food market had an approximate worth over 50.000 million euros, with a growth rate of 4 to 6% expected over the next five years.

Key elements driving the overall expansion of the global baby food market are the growing urban population and changing lifestyles of individuals as a result of significant increases in disposable incomes. Furthermore, as the number of women at work increases, there is less time for meal preparation and breast-feeding, resulting in a demand for high-quality baby food.

The largest infant food market is in Asia-Pacific, whereas the fastest-growing market is in North America. The Asia-Pacific region's high birth rates and expanding purchasing power have boosted demand for infant food and milk formula-based goods. China is the region's largest market. Furthermore, growing economies such as India and Indonesia are expected to fuel the region's market expansion.

Baby foods market – Growth rate by region

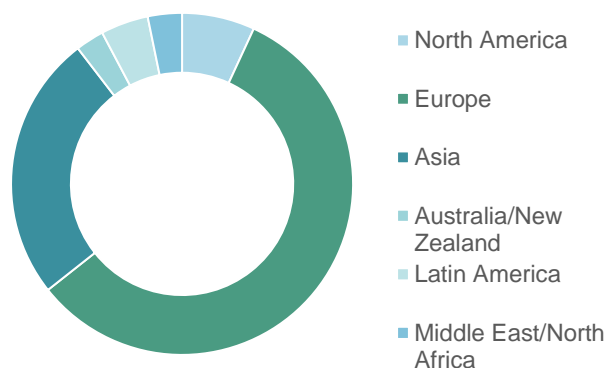


Source: Mordor Intelligence

Currently, milk formula has the greatest market share, followed by the prepared baby food product sector. Asia-Pacific region has a significant concentration of milk formula baby food sales. The supermarket segment accounts for a considerable percentage of the infant food market in terms of distribution channels.

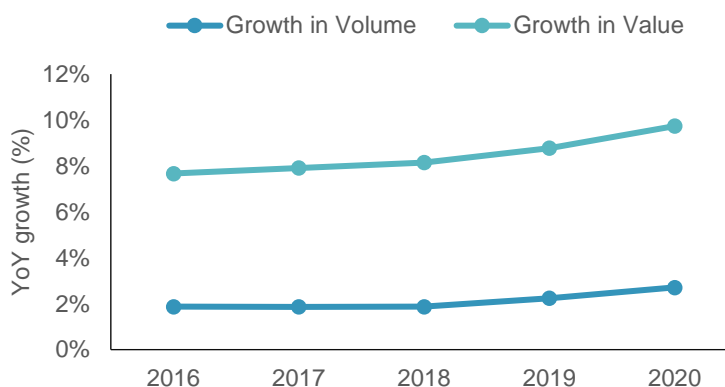
In 2021, Europe was the most active market in terms of new products development for both baby and toddlers, followed by Asia. Netherlands is the top exporter of baby foods, followed by Ireland, New Zealand and France. China, Hong Kong and Australia are among the top importers.

New products development, by region (2021)



Within the period 2016-2020 both value and volume were growing, of which value growth was higher than volume growth.

Baby foods market – Growth in volume and value



Globally, Nestle (Switzerland) is the main company in terms of revenue, followed by Danone (France) and Reckitt Benckiser Group plc (United Kingdom).

Top five most valuable baby food products companies in 2020 globally

Position	Brand name	Revenue (million USD)
1	Nestle (Switzerland)	90,321
2	Danone (France)	26,981
3	Reckitt Benckiser Group plc (United Kingdom)	17,967
4	Royal Friesland Campina (The Netherlands)	12,561
5	Abbott Laboratories (United States)	7,726

Source: Macrotrends, Friesland Campina

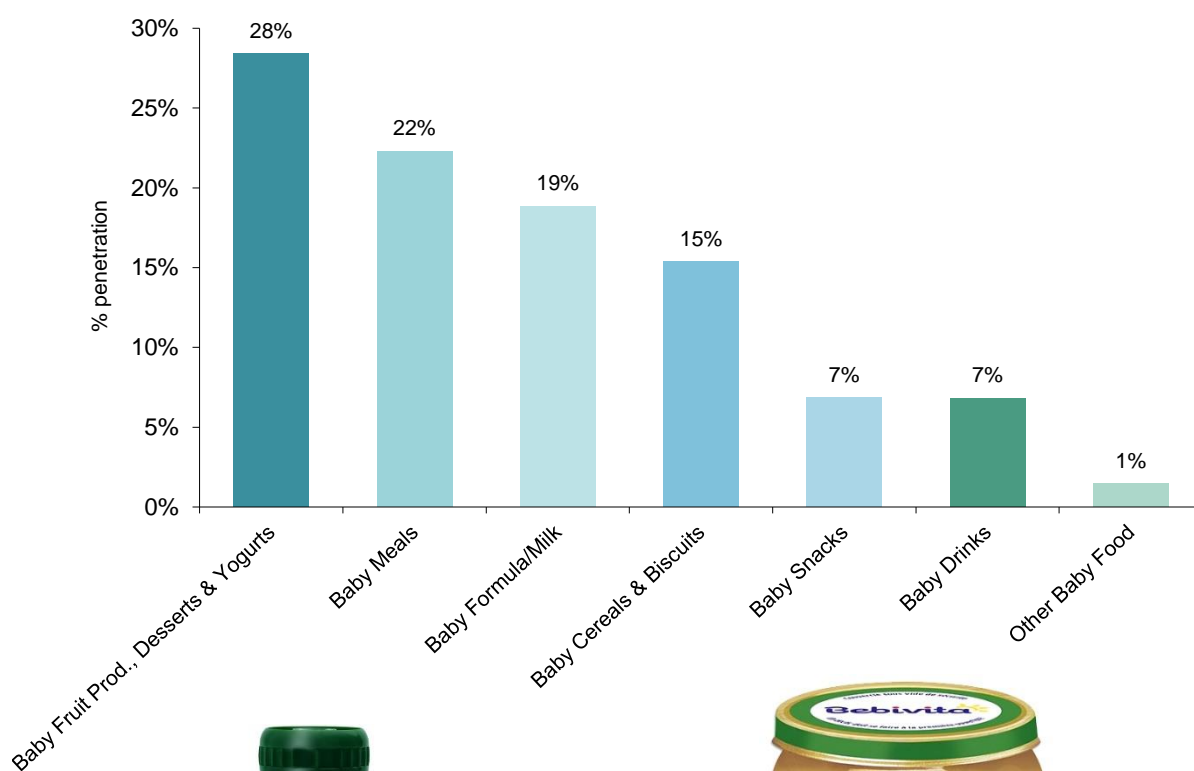
3. New products and positioning



3.1 New products development in Europe

Baby fruit products, desserts and yogurts is the leading subcategory with a 28% of market penetration. Additionally, it presents a growth of 11%. The next subcategory in terms of market penetration is Baby Meals, with a growth of 8%, and Baby formula/milk, with a growth of 18%. Other growing subcategories are Baby Cereals & Biscuits (17%), Baby snacks (22%) and, more significantly, Other baby food (35%).

Baby & Toddlers NPD in Europe (2017-2021)



Organic green apple, strawberry, banana and blueberries puree, for babies from 4 months (**Portugal**).

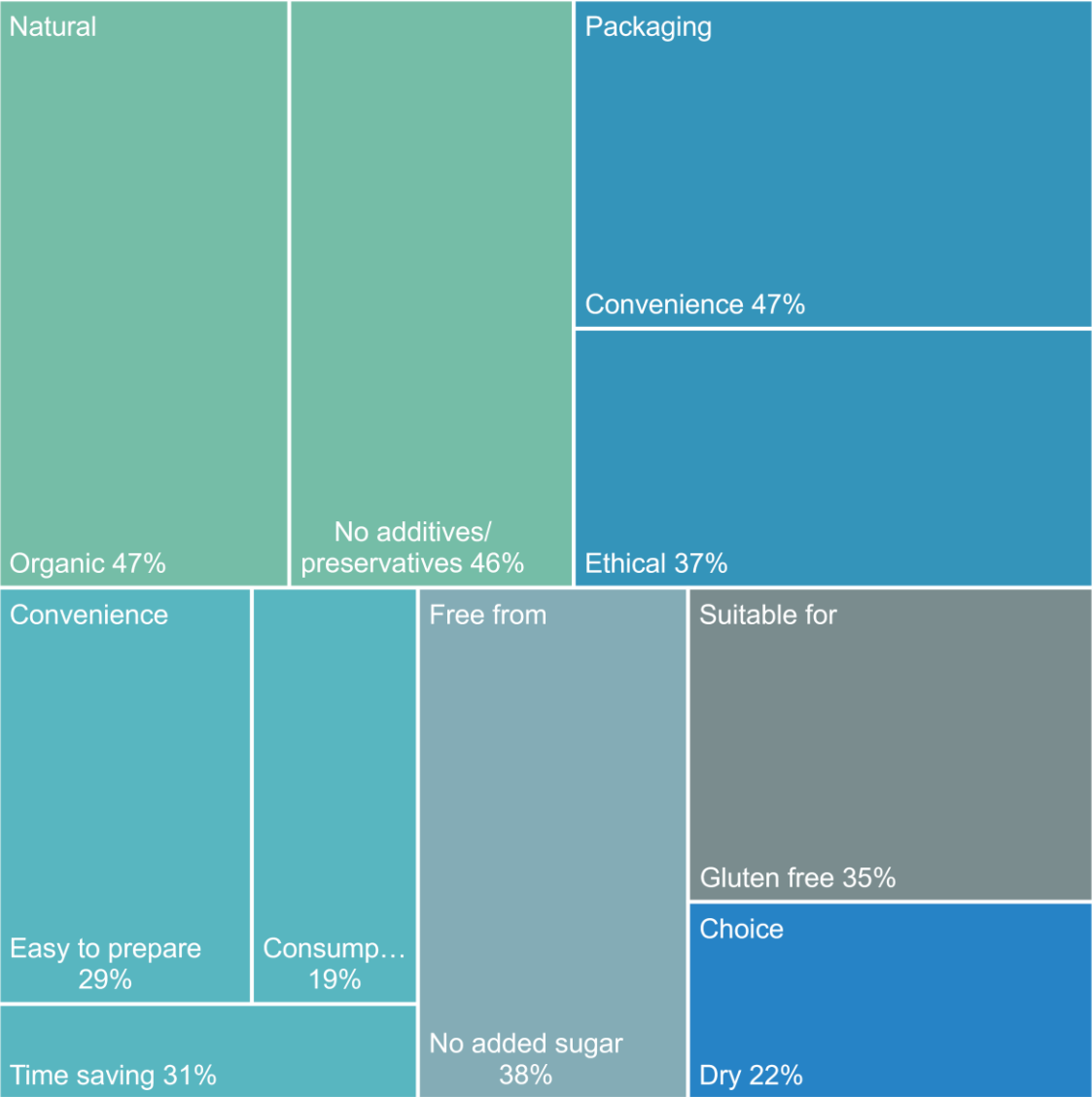


Organic garden vegetables puree for babies from 6 months (**France**).

3.2 Positioning in the European market

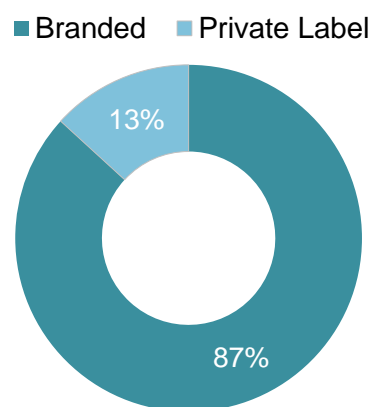
Organic, No additives/Preservatives and Convenience packaging are the main positioning claims. *Convenience packaging* presents the strongest growth (72%), and *Organic* and *No additives/Preservatives* are growing at rates of 25% and 7%, respectively. Other recurrent positioning claims are *Ethical packaging*, with a growth of 6%, *No added sugar*, with a growth of 21%, *Easy to prepare*, with a growth of 16%, and *Gluten free*, with a growth of 4%.

Top 10 main positionings in Europe (2017-2021)



3.3 Top brands in AHFES countries

Branded products cover almost 90% of the Baby & Toddlers market and are growing at a rate of 10%. Even though the market penetration of private label products is still very low compared to the branded products, the growth rate is 24%, double that of branded products. The main brands regarding the new products on the market within the period 2017-2021 are Hero Baby (Spain), Bledina (France), Cow and Gate (United Kingdom and Ireland) and Nutriben (Portugal).

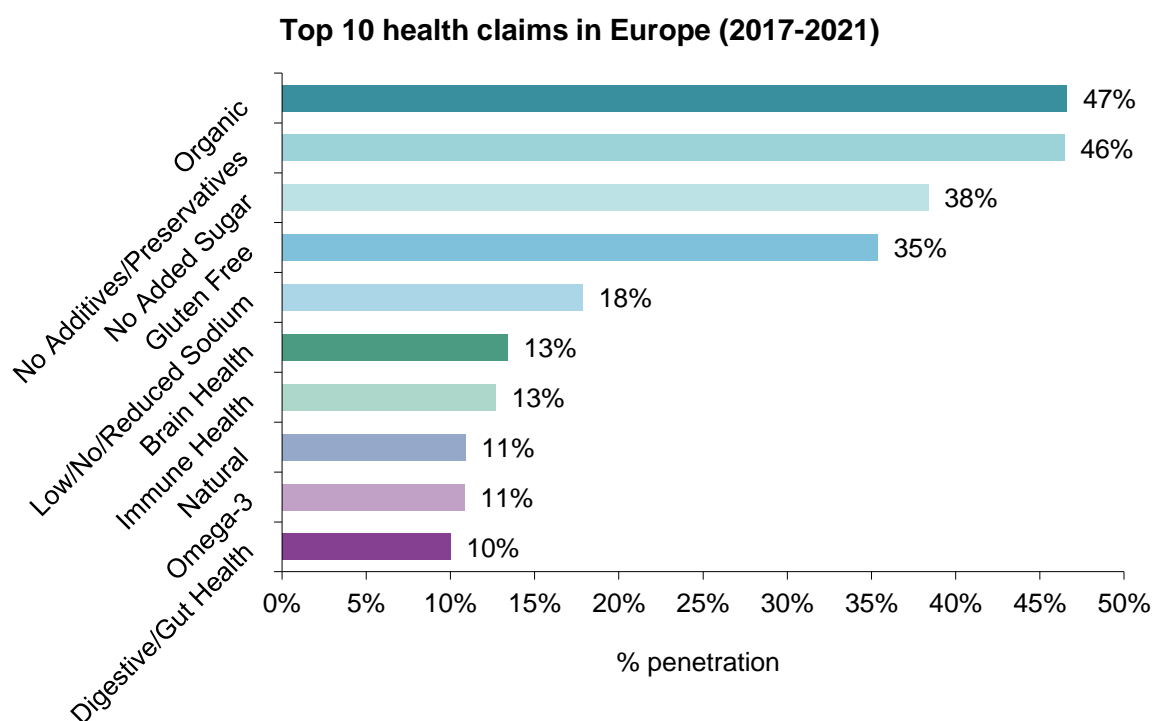


Top 10 main brands in Europe (New products development, 2017-2021)

Top 10 brands	Spain	France	United Kingdom	Portugal	Ireland
1	Hero Baby	Bledina	Cow And Gate	Nutriben	Cow And Gate
2	Nestle	Babybio	Ella's Kitchen	Bledina	Hipp
3	Nutriben	Hipp	Hipp	Nestle	Ella's Kitchen
4	Smileat	Nestle	Kiddylicious	Naturnes	Organix
5	Hero	Good Gout	Heinz	Smileat	Aptamil
6	Almiron	Naturnes	Piccolo	Continente	Heinz
7	Naturnes	Comme Des Papas	Organix	Holle	Kiddylicious
8	Yogolino	Yooji	Aptamil	Nan	Sma
9	Nan	Guigoz	Little Freddie	Cerelac	Holle
10	Holle	Bledichef	Little Dish	Aptamil	Piccolo

3.4 Health claims in the European market

Organic and *No additives/preservatives* are the main health claims, which are growing at rates of 25% and 7%, respectively. *No added sugar* and *Gluten free* are other popular health claims, which are also growing, at rates of 21% and 4%. Other growing trends are *Immune Health* (17%), *Omega-3* (14%), *Natural* (14%) and *Brain Health* (12%).



Stage 2 organic milk-based formula powder for babies from 6 months (Spain).

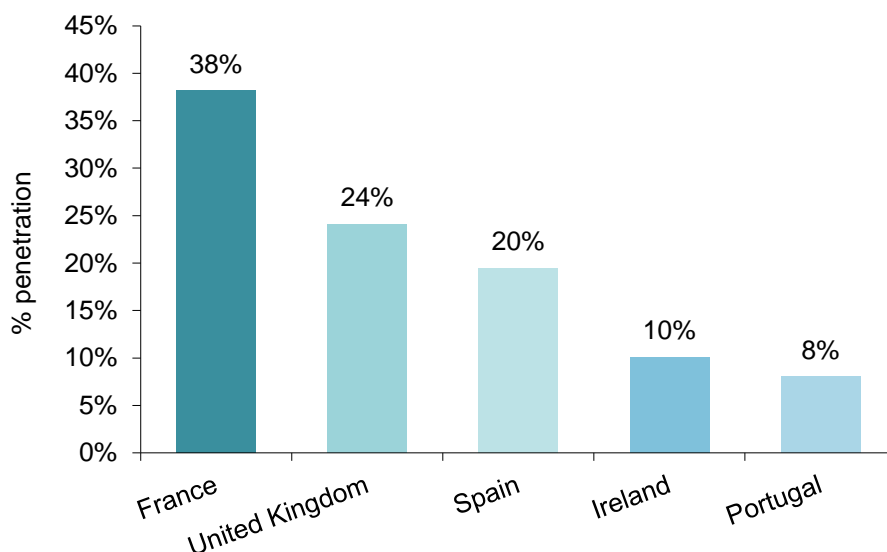


Mango and carrot oat bars for toddlers from 12 months with no additives or colouring (Ireland).

3.5 New products development in AHFES countries

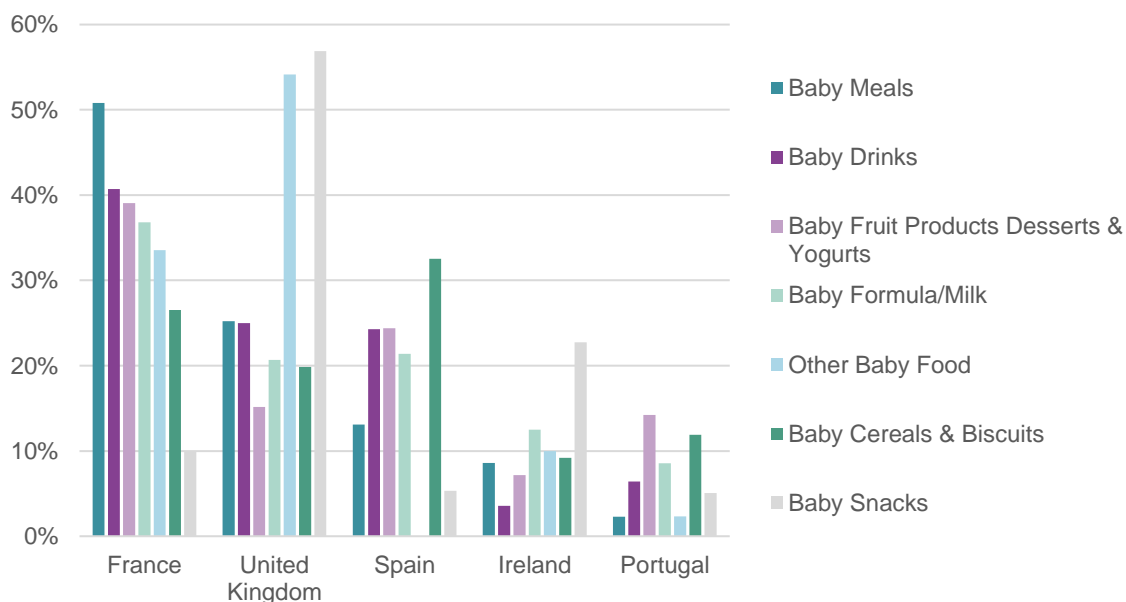
France and United Kingdom lead the development of new products among AHFES countries with 38% and 24% of market penetration, respectively. In France, the development of new products is growing, and this is especially notable in Portugal, with a growth of 47% within the period 2017-2021..

Baby & Toddlers NPD in AHFES countries (2017-2021)



Per subcategory, Baby Meals leads the list in France, Baby Snacks in United Kingdom together with Other Baby Foods, Baby Snacks in Ireland, Baby Cereals & Biscuits in Spain, and Baby Fruit Products, Desserts & Yogurts in Portugal, followed closely by Baby Cereals and Biscuits.

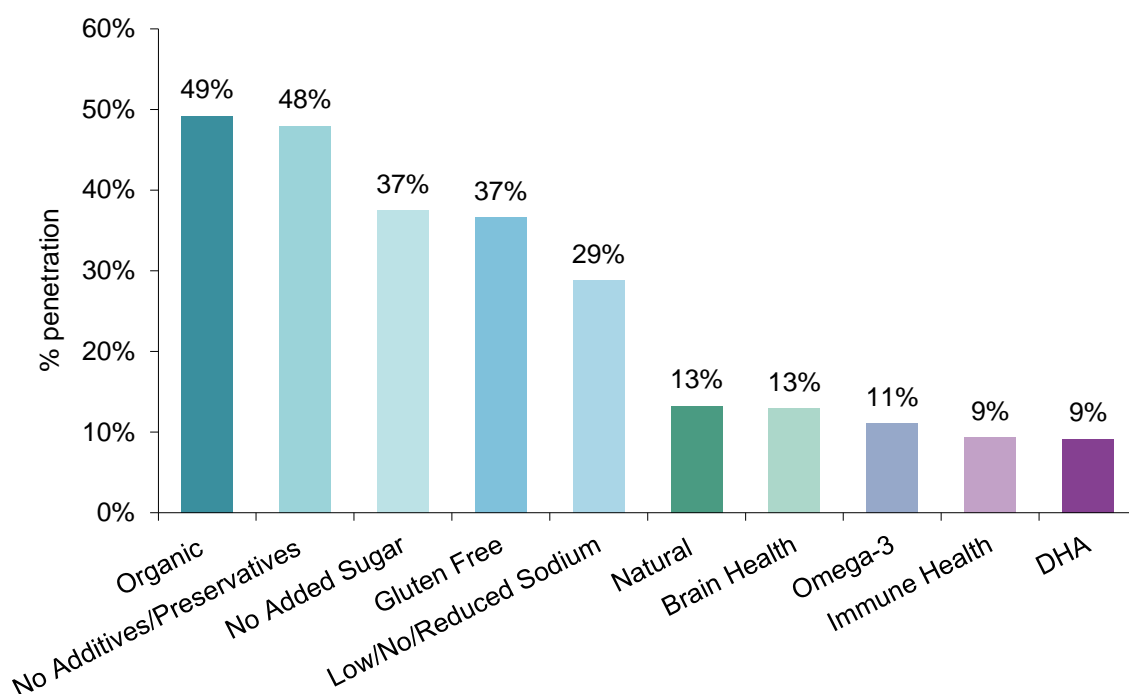
Baby & Toddlers NPD in AHFES Countries (2017-2021)



3.6 Main health claims in AHFES countries

Organic, together with *No additives/Preservatives* are the main health claims, the first growing at a rate of 18%. Other recurrent claims are *No added sugar*, which is growing at a rate of 9%, *Gluten free* and *Low/No/Reduced sodium*. Other claims with significantly growing rates are *Omega-3* (26%) and *Immune Health* (23%).

Top 10 health claims in AHFES (2017-2021)



Instant cereal made from a blend of 7 cereals, milk, apple and banana fruit, for babies from 6 to 10 months onwards and with no added sugar (United Kingdom).



Corn meal for babies of 6 months with no added salt (France).

4. Top trends



4.1. Gut health

Including probiotics and prebiotics in baby food can aid in the development of a strong immune system during the first six months of life, when the digestive system is developing. Popular infant food ingredients that gained special relevance during the Covid pandemic include supplements for digestive health and immunity. Most parents are concerned about their children's digestion, considering it their top priority. Recent global infant formula patents address digestive issues in 29% of cases and gut-immunity in 13% of cases in response to this.



Stage 1 ProTech formula with optimized fraction and symbiotic effect of prebiotics and probiotics (**Spain**).



Stage 3 organic cow milk-based formula powder with probiotics to facilitate digestion (**France**).



4.2. Organic wave

Organic has become a food trend that has now moved to infant food. When it comes to feeding their children, parents prefer chemical-free products. Likewise, naturalness and clean practices are top objectives. In 2019, 10% of new baby milk formula product launches around the world carried an organic claim, 7% more than 2015. For many parents, organic ingredients are related to product safety (including free from pesticides and fertilizers) and address environmental sustainability concerns. Furthermore, an increasing number of parents desire to buy infant food that has not been genetically modified. Also, a growing number of parents are opting for clean labels and avoiding artificial or synthetic ingredients in their children's food.



Organic vegetables and tomato pasta dinner (**France**).



Blend of organic pears for babies from 4 months onwards (**United Kingdom**).



4.3. Superfoods and ancient grains

Super foods, such as blueberries, pomegranate, goji berries, acai, and beetroot, have become one of the most popular trends in novel food products in recent years, providing antioxidants and increased amounts of nutrients. Only blueberries, on the other hand, are regularly found in baby food. As a result, it appears that supplying highly nutritious super meals is a way to appeal to parents. Single-grain and multigrain cereals have long been popular in the infant feeding sector. They are being replaced in favour of ancient grains, which are claimed to be more nutritious. Some of the most popular heritage grains include quinoa, teff, millet, spelt, chia, and buckwheat. Ancient grains are high in protein, fibre, and a range of vitamins and minerals, all of which support heart, digestive, and immunological health.

Wafer wisps with banana and pumpkin flavor with ancient grains
(United Kingdom).



Organic oat superfood porridge with blueberry, banana and lemon, for weaning babies from 7 to 9 months (France).



4.4. Immune health promotion

Manufacturers are aiming to make infant formula with similar characteristics to human breast milk, and the importance of the baby gut microbiome is gaining special attention. Probiotics appear to have a positive impact on an infant's immune system, providing both short and long-term advantages, and are thus gaining popularity. Immune support and viral infection prevention will be emphasised, particularly for babies and vulnerable individuals with compromised or damaged immune systems. Additionally, the pandemic has spurred public interest in the relationship between health, food, and immunity. As a result, products that meet these needs have the potential to make a huge impact in the future.



Stage 3 growing-up milk formula powder with galactoligosaccharides (GOS), present in breast milk, which strengthen the immune system (Portugal).



Instant 8 cereals porridge for babies from 5 months, containing Vitamin A which contributes to the proper functioning of the immune system of children (Spain).

CONTAINS
VITAMIN D
TO SUPPORT THE
NORMAL FUNCTION
OF THE IMMUNE
SYSTEM



4.5. Plant-based products

The plant-based global trend is increasingly influencing the infant food sector. Plant-based components, on the other hand, cannot always get the formulation closer to breast milk to provide the proper nutrient requirements. A plant-based diet necessitates thorough planning to ensure that all nutritional demands are addressed, including nutrients such as Vitamin B12, iron, and omega 3 fatty acids. As more parents switch to plant-based diets partly due to health benefits, there is a spike in interest in adapting baby foods to such diet. This may become more mainstream as a result of COVID-19. In addition, it appears that the market for infant snack meals has grown significantly, with a primary focus on vegetable-based snacks and fruit snacks without additives and minimizing sugar.



Spinach falafel bites for toddlers, providing plant-based energy (**United Kingdom**).



Organic plant dessert with coconut milk, mango, banana and passion fruit, for babies from 6 months (**France**).



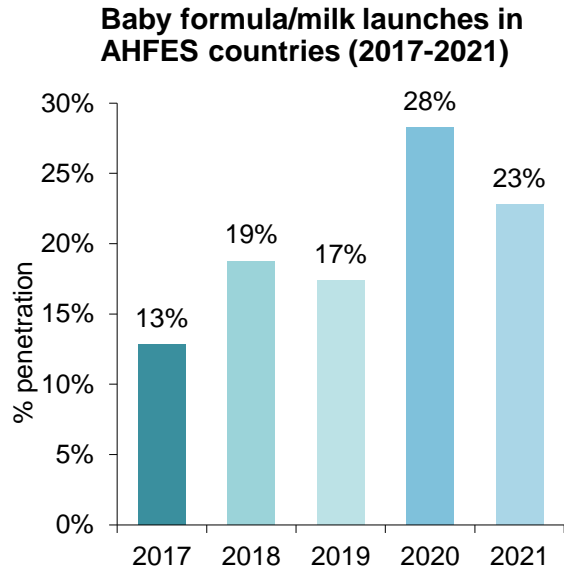
5. Categories



5.1 Baby formula/Milk



Baby formula/milk is a category that presented an irregular growth until 2020, with a slight decline in 2021, but still surpassing the market penetration of the previous years. The accumulated growth within the period 2017-2021 is 15.4%.

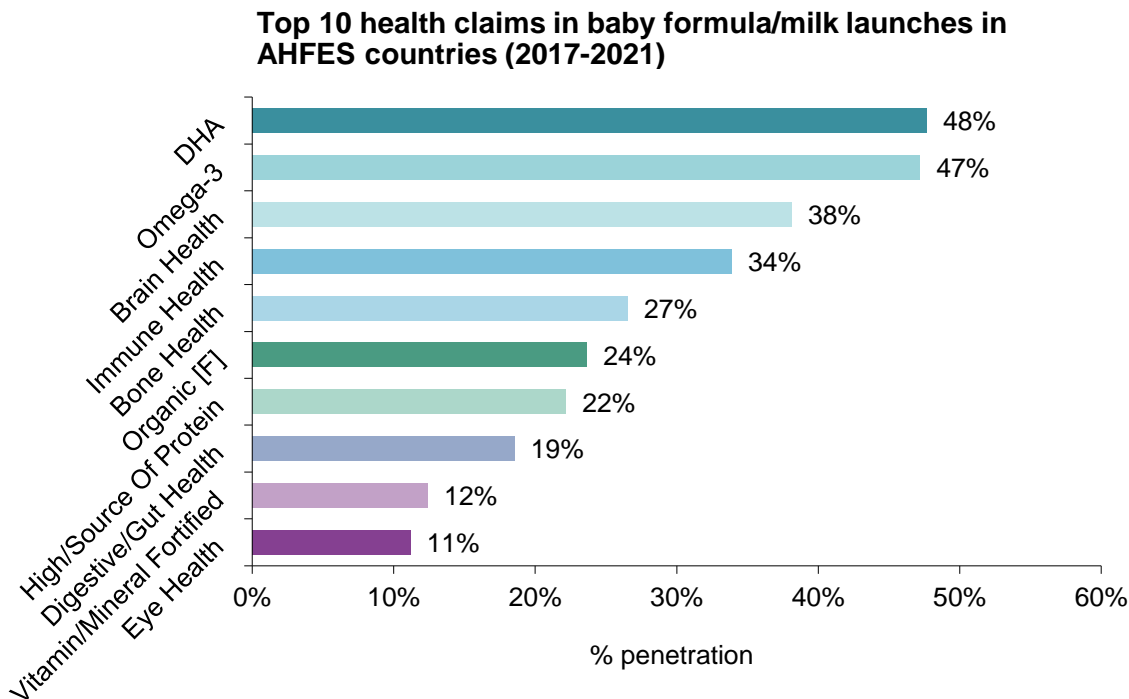


CAGR
(2017-2021)
15.4%



Stage 1 organic thickened milk formula powder for infants from 0 to 6 months (**France**).

In this category the top 10 health claims are growing. DHA, Omega-3 lead the list, with prominent growths of 55% and 29%. Other popular claims are *Brain Health*, *Immune Health* and *Bone Health*, which show growths of 17%, 31% and 13%, respectively.



DHA and Omega-3 are the main claims and present strong growths



Stage 2 ready to drink milk formula drink for feeding babies from 6 to 12 months containing DHA (**United Kingdom**).



First infant milk nutritionally complete breastmilk substitute with omega 3 (**Ireland**).

Brain Health, Immune Health and Bone Health, other growing popular claims



Stage 3 organic growing-up milk formula powder for toddlers from 12 months which contributes to the development of the brain (**Spain**).



Stage 4 growing-up milk-based formula powder for toddlers from 12 months that helps the immune system (**Portugal**).



Stage 2 follow on milk formula powder for babies from 6 months to 1 year with ingredients that contribute to the normal development of bones and teeth (**France**).

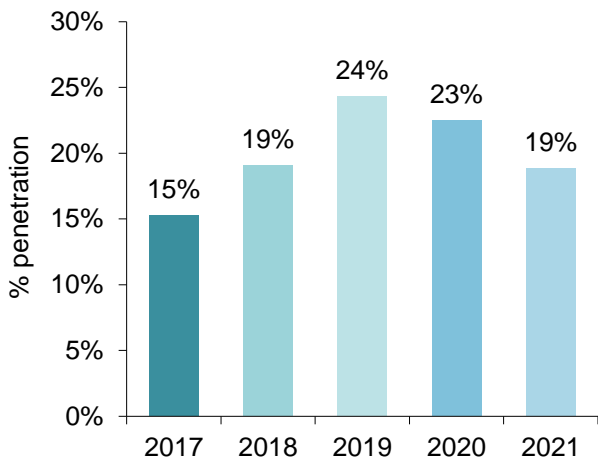


5.2 Baby solid food



The category Baby solid food presented a growth until 2019, and declined slightly until 2021, to finalize in an accumulated growth within the period 2017 to 2021 of 5.5%.

Baby solid food launches in AHFES countries (2017-2021)



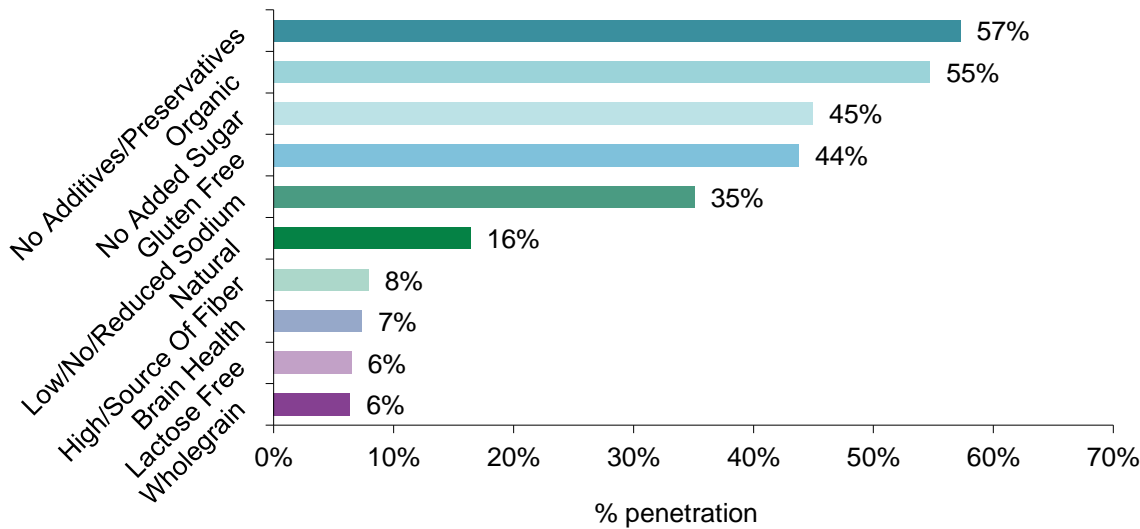
CAGR
(2016-2020)
5.5%



Strawberry and banana with yogurt puree, for toddlers from 12 months onwards (**Portugal**).

No additives/Preservatives is the main health claim together to *Organic*, with market penetration rates of 57% and 55%, respectively. Additionally, *Organic* presents a growth of 16%. Other popular claims are *No added sugar*, with a growth of 9%, *Gluten free* and *Low/No/Reduced sodium*. It is remarkable the growth of *High/Source of Fibre* (17%), although the market penetration rate (8%) is lower than other recurrent claims.

Top 10 health claims in baby solid food in AHFES countries (2017-2021)



No additives/Preservatives is the most popular claim

Organic is a popular claim and is growing



100% organic squished smoothie yellow fruits packed with bananas, apples, passion fruit juice and dash of lemon juice for babies from 6 months with nothing artificial (**Ireland**).



Corn, courgette, carrot, chickpea and bulgur dish for toddlers from 12 months certified organic (**France**).

No added sugar, Gluten free and Low/No/Reduced sodium are recurrent claims



Handmade steamed apple puree, for babies from 4 months onwards, with no added sugars (**Spain**).



Vegetable plus lentil bake with cumin, for babies from 7 months onwards gluten free (**United Kingdom**).



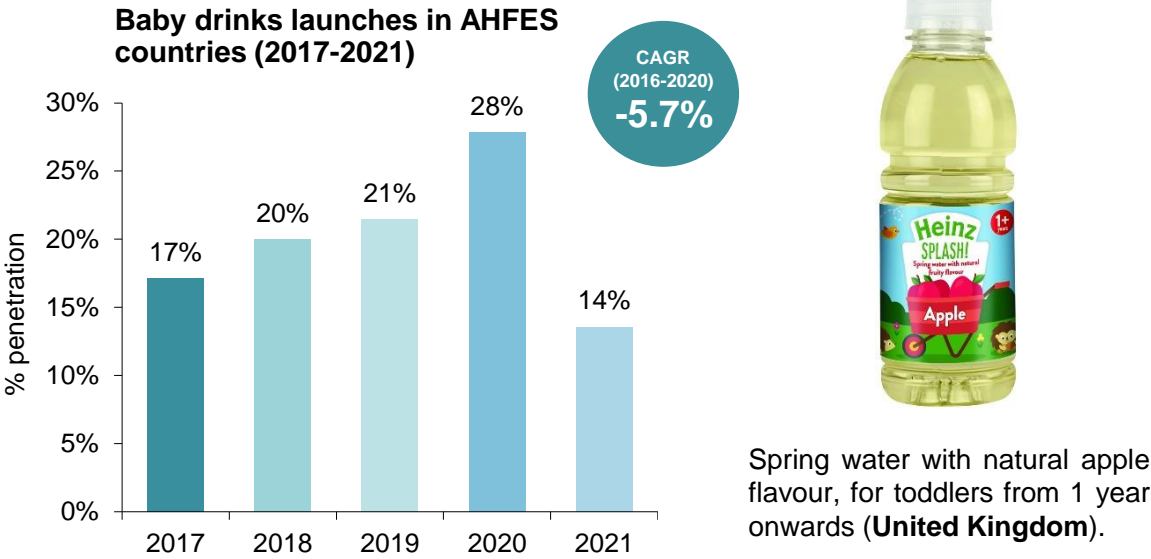
Pureed organic chicken with rice, for babies from 6 months onwards without added salts (**Portugal**).



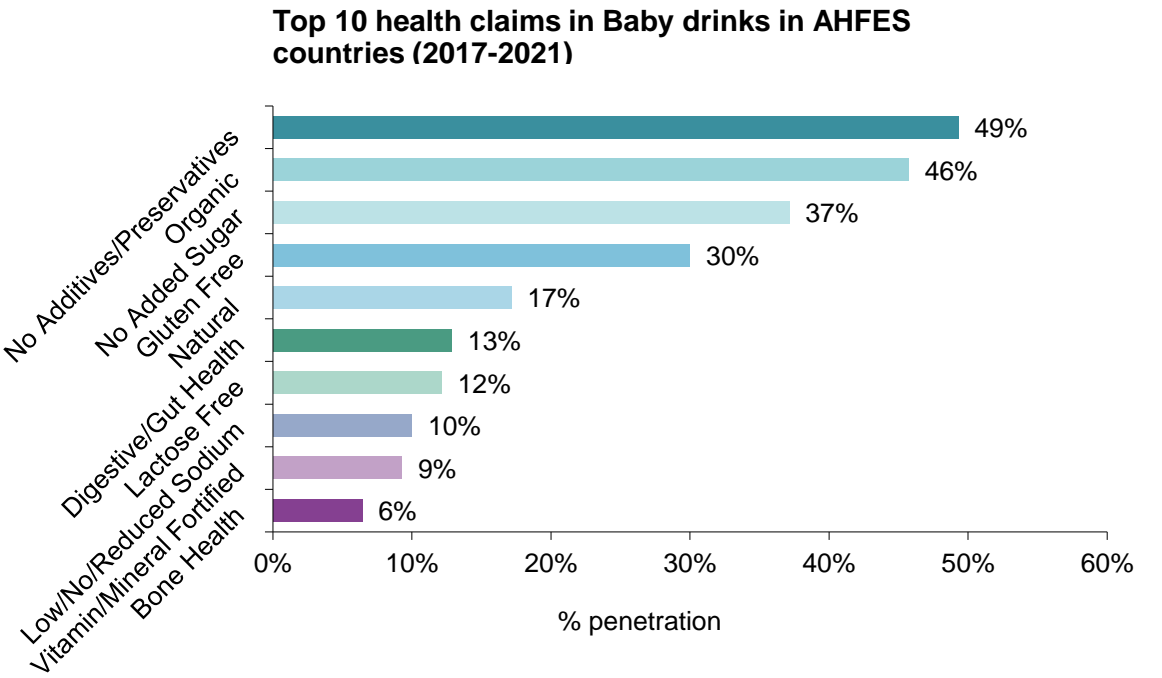
5.3 Baby drinks



The category Baby Drinks showed a continuous growth from 2017 to 2020 but declined significantly in 2021.



No additives/Preservatives and *Organic* are the main health claims, followed by *No added sugar* and *Gluten free*, presenting market penetration rates of 49%, 46%, 37% and 30%, respectively. Yet with lower market penetration rates, health claims such as *Low/No/Reduced sodium*, *Lactose free* and *Vitamin/Mineral/Fortified*, present remarkable growths.



No additives/preservatives and Organic stand as the most popular claims



Apple and mango drink for babies from 6 months with no colours or preservatives (**France**).



Organic apple juice with mineral water, for babies from 12 months onwards (**United Kingdom**).

No added sugar is a recurrent claims



Organic water and forest fruit drink for toddlers from 12 months with no added sugar (**Portugal**).



Low sodium spring water for toddlers from 12 months and onwards (**Ireland**).



Lactose free instant infusion tea with chamomile, lemon balm and lindens for infants from 6 months (**Spain**).



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CHILDREN'S DRINKS FORTIFIED WITH THE ESSENTIAL
NUTRIENTS TO SUPPORT HEALTHY DEVELOPMENT



Gluten Free



Vegan

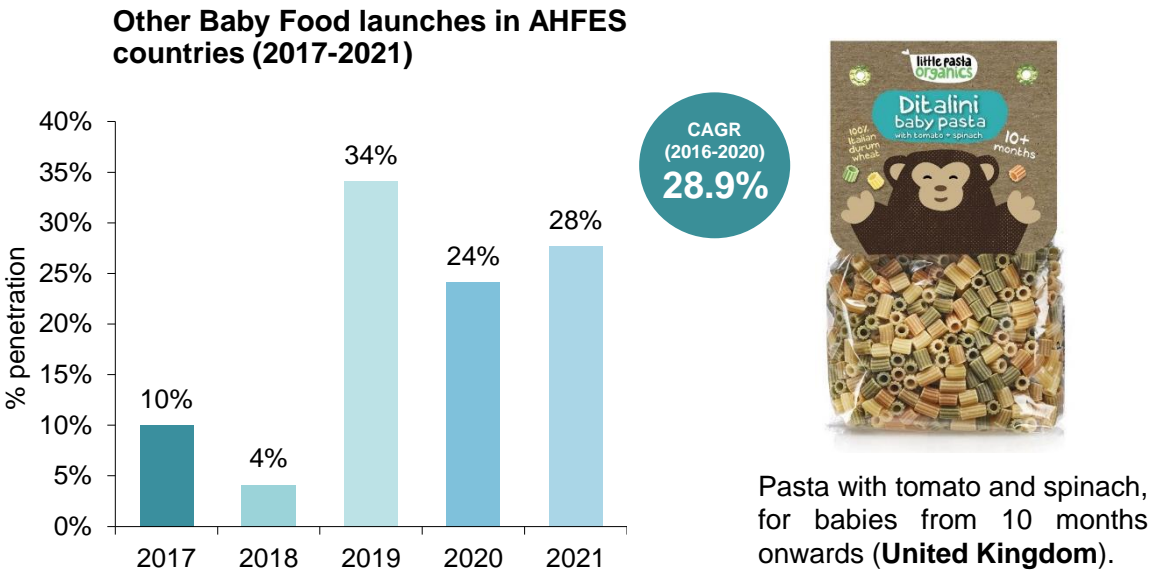


Dairy Free

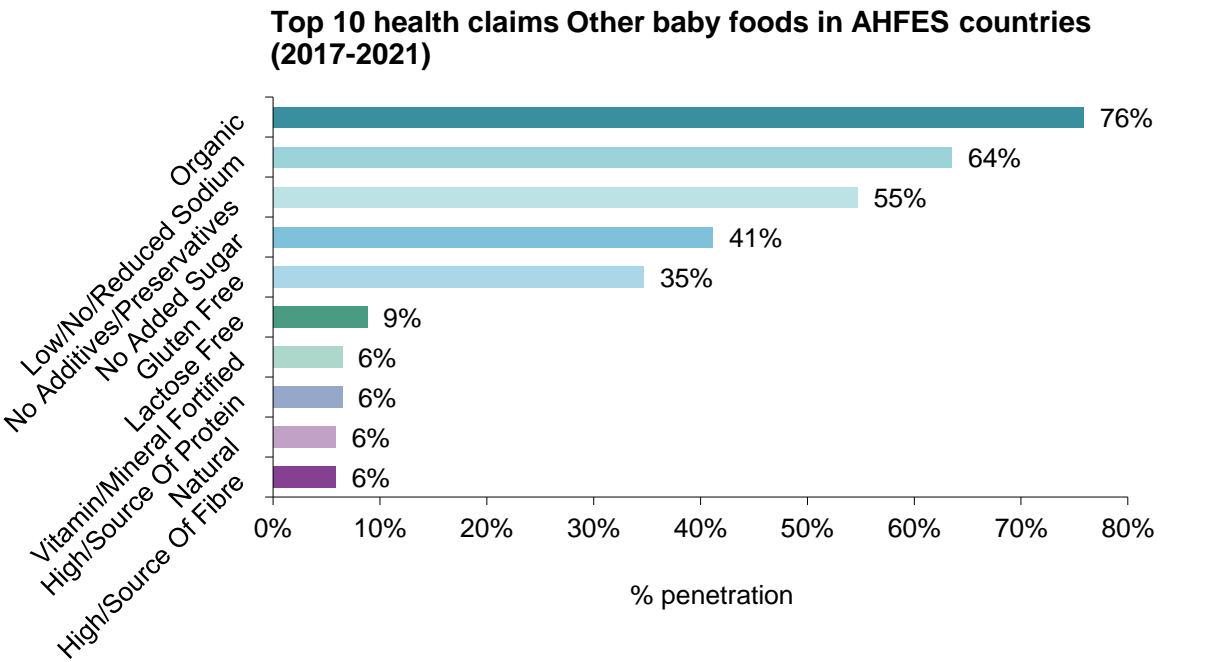
5.4. Other baby food



Other Baby Food products increased their market presence since 2019 and show and accumulated growth within the period 2017-2021 of almost 30%.



The main health claim is *Organic*, with a penetration of 76% and an important growth of 61%. Other popular health claims are *Low/No/Reduced sodium*, with a penetration of 64% and a growth of 18% and *No additives/Preservatives*, with a penetration of 55% and growth of 22%. *Gluten free* is also a recurrent claim and presents a strong growth of 82%. Another growing claim is *Vitamin/Mineral Fortified* (32%).



No additives/Preservatives, Gluten free and Low/No/Reduced sodium are popular and growing claims



Couscous for babies from 7 months onwards with no added preservatives, flavours or colours (**Ireland**).



Gluten free sauce blend with pumpkin, vegetables and cheddar cheese, for babies from 7 months onwards (**United Kingdom**).



Organic star shaped pasta for babies from 10 months with no added salt (**France**).

Organic is the main claim and is growing significantly



Organic pasta with tomato and spinach, for toddlers from 3 years old onwards (**Portugal**).

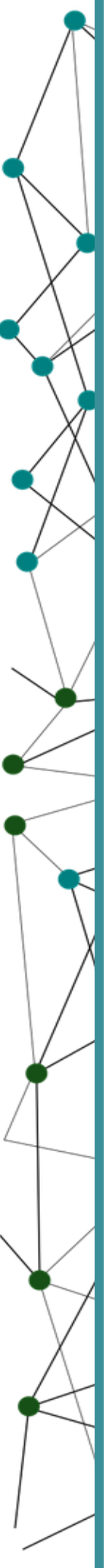


Organic pasta for babies from 7 months onwards fortified with vitamin B1 (**United Kingdom**).



6. Conclusions





The baby foods market is growing, and it is predicted that the tendency will continue in the upcoming years due to growing population and changes of lifestyles, specially for women. Asia-Pacific region holds the largest market share in part due to the significant growth of baby formula/milk. Europe is the most active market in terms of new products development.

In Europe, Baby fruit products, desserts and yogurts is the category with more new products within the period 2017-2021, followed by Baby meals and Baby formula/milk. Natural products such as organic products and products with no additives or preservatives represent the main market positioning, together with ethical and convenience packaging. New foods without added sugars and gluten free are also a tendency. The reduction of salt is a popular claim too. Within AHFES countries, France leads the development of new products followed by United Kingdom.

The presence of probiotics and prebiotics as well as the addition of ingredients to promote gut and immune health, respectively, is a trend in baby foods products. Organic and plant-based foods are trends that have been observed transversally in all food sectors, and baby foods is not an exception. Finally, the use of superfoods and ancient grains has expanded amongst the infant food product sectors.

All subcategories of study are growing except Baby drinks, which after four years of permanent growth suffered a strong decrease in 2021. The growth of Other baby foods such as pasta or vegetable blends and baby formula/milk is very notable. Baby solid food has also experienced growth, but more modest.

The baby foods sector present great opportunities for innovation. Recommended areas of focus are the reduction of additives or preservatives, the use of organic ingredients and the reduction of sugars and salts. Taking advantage of the global trend of plant-based products or protein can attract parents that have reduced or eliminated the consumption of meat. Finally, paying special attention to gut and immune health, and the use of highly nutritious ingredients such as ancient grains and superfoods is a plus.

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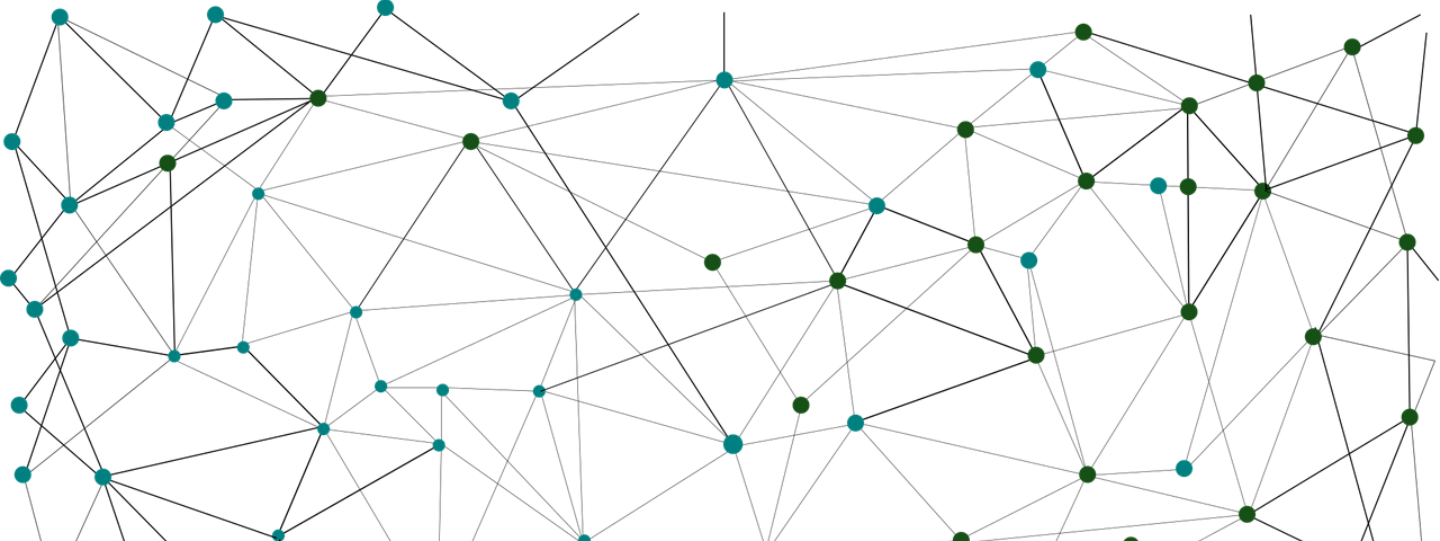
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