

Infant Nutrition - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Infant Nutrition Market Analysis

The infant nutrition market size stands at USD 101.70 billion in 2025 and is forecast to reach USD 144.71 billion by 2030, advancing at a 7.31% CAGR. Growth rests on dual-income household expansion, regulatory approval of human milk oligosaccharides (HMOs), and technology that reproduces breast-milk complexity. Premium product uptake remains robust as parents trade price sensitivity for scientifically validated cognitive and immune benefits. Emerging precision-fermentation ingredients, direct-to-consumer (D2C) subscriptions, and e-commerce logistics enhance consumer reach while tightening supply-chain resilience after the 2022 shortage. Asia-Pacific's purchasing power and Middle East & Africa's demographic tailwinds strengthen regional demand, whereas litigation linked to necrotizing enterocolitis (NEC) pushes manufacturers toward safer, more transparent formulations.

Global Infant Nutrition Market Trends and Insights

Rise in Working Mothers & Dual-Income Households

Employment rates above 70% among mothers in leading economies shorten breastfeeding periods and increase reliance on premium formula. A 2021 National Immunization Survey-Child review showed states with paid family leave achieving 5.36% higher exclusive breastfeeding, yet formula usage still rose as mothers returned to work. Busy parents accept subscription services and connected bottle warmers that integrate feeding logs into health apps, revealing a willingness to pay for ease of

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mind as well as nutrient density.

Higher Spending on Infant Health & Premiumization

Parents now equate early nutrition with lifelong cognitive benefit, elevating super-premium offerings. Nestle's 2024 NAN Sinergy introduced six HMOs plus Bifidobacterium infantis at higher price points. Although a 2025 UK Competition and Markets Authority analysis suggested potential annual savings of GBP 500 from lower-priced brands, premium lines keep expanding because perceived health returns override cost.

Stringent Safety Regulations & Recall Risk

Following the 2023 shortage, the FDA now mandates a five-day notification for production disruptions, increasing compliance costs and favoring incumbents with sophisticated quality systems. China's State Administration for Market Regulation achieved a 99.85% pass rate in 2023 inspections, yet heightened scrutiny eliminates smaller producers, concentrating volume within multinationals.

Other drivers and restraints analyzed in the detailed report include:

Surge in Demand for Organic & Clean-Label Nutrition / Regulatory Green-Lights for HMOs & Lactoferrin / Contamination Scandals Eroding Consumer Trust /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Specialty formulas post a 9.8% CAGR through 2030, contrasting with Infant Formula's dominant yet flatter trajectory. The infant nutrition market size for specialty products is projected to exceed USD 28 billion by 2030 as parents seek targeted solutions for prematurity, cow's-milk allergy, or metabolic disorders. Immune-specific blends containing HMOs and lactoferrin secure endorsement from neonatal units, reinforcing premium positioning. Follow-on and Growing-up Formulas widen brand lifetime value by accompanying toddlers into early childhood. Meanwhile, prepared baby foods and finger snacks ride the same premiumization wave, using organic labeling to capture parental loyalty.

Specialty players leverage regulatory wins; Nestle Health Science's cow's-milk protein allergy solution combining HMOs and probiotic B. infantis gained wide paediatric adoption in 2025. These launches illustrate how intellectual-property-backed ingredients create durable differentiation. Therapeutic nutrition tie-ins with paediatricians also insulate specialty lines from price-based retail competition, sustaining double-digit growth inside the broader infant nutrition market.

Powder dominated 78.4% of the infant nutrition market size in 2024 due to cost efficiency and room-temperature stability. Yet Ready-to-Feed's 8.9% CAGR signals a convenience premium that dual-income urban parents embrace. RTF eliminates measuring errors and lowers contamination risk, which is vital amid heightened safety concerns. Liquid Concentrate supplies a transitional option for consumers balancing economy with reduced preparation time.

Technology improvements, such as Gentle-UHT pasteurization, permit shelf-stable RTF without nutrient degradation. LactaLogics, halfway through a USD 92 million US facility, plans a 2025 roll-out of donor-milk-based RTF aimed at neonatal intensive-care units. As manufacturing costs drop and cold-chain coverage expands in emerging markets, RTF traction will accelerate, raising its share inside the infant nutrition market by the end of the decade.

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The Infant Nutrition Market is Segmented by Product (Infant Formula and Baby Food), Form (Powder, Liquid Concentrate, and More), Ingredient Cow-Milk Based, Goat-Milk Based, and More), Distribution Channel (Hypermarkets & Supermarkets, Pharmacy & Drug Stores, E-Commerce, and More), and Geography (North America, Europe, Asia-Pacific, and More). The Market Sizes and Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific generated 44.3% of the infant nutrition market share in 2024 and sustains leadership despite declining Chinese births. Manufacturers shift toward premium SKUs and cross-border e-commerce to offset volume contraction. India's regulator tightened licensing for high-risk foods in 2025, favoring large incumbents capable of meeting stringent documentation. Southeast Asian economies contribute incremental volume, buoyed by urbanisation and rising disposable incomes. The diversity of incomes and regulatory frameworks across APAC obliges companies to localise flavors, pack sizes, and ingredient lists while maintaining global safety standards.

Middle East and Africa recorded the fastest 7.4% CAGR, fueled by demographic expansion and improving healthcare infrastructure. Gulf Cooperation Council countries show high breastfeeding intent yet low exclusivity rates, leaving space for formula supplementation among affluent expatriate populations. Across Sub-Saharan Africa, malnutrition-oriented fortified blends gain traction, though affordability remains a barrier. Regional success typically hinges on distributing single-serve powder sachets and forging public-private alliances to penetrate rural areas.

North America and Europe remain innovative hotspots where growth depends on premiumization rather than volume. The US market benefits from regulatory clarity on novel ingredients, enabling Abbott to post 14.2% pediatric nutrition growth in Q1 2025. Litigious risk, however, escalates insurance and recall costs. European consumers prioritize organic certification and carbon-neutral credentials. Faster EFSA novel-food approvals spur rapid HMO rollouts, with local contract manufacturers scaling capacity to serve smaller premium brands.

List of Companies Covered in this Report:

Abbott Laboratories / Nestle S.A. / Danone / Reckitt Benckiser Group Plc (Mead Johnson) / Royal FrieslandCampina N.V. / Bellamy's Organic / The Kraft Heinz Company / Perrigo Company / Synutra International / A2 Milk Company Ltd. / Hero Group / Arla Foods amla / Fonterra Co-operative Group Ltd. / Ausnutria Dairy Corporation Ltd. / Inner Mongolia Yili Industrial Group / China Feihe Ltd. / Beingmate Baby & Child Food Co. / HIPP GmbH & Co. Vertrieb KG / Dana Dairy Group Ltd. / Baby Gourmet Foods /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology

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3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rise In Working Mothers & Dual-Income Households

4.2.2 Higher Spending On Infant Health & Premiumisation

4.2.3 Surge In Demand For Organic & Clean-Label Nutrition

4.2.4 Regulatory Green-Lights For HMOs & Lactoferrin

4.2.5 D2C Subscription & Smart-Feeding Ecosystems

4.2.6 Localization Amid China's 2023 Formula Registration Rules

4.3 Market Restraints

4.3.1 Stringent Safety Regulations & Recall Risk

4.3.2 Contamination Scandals Eroding Consumer Trust

4.3.3 Falling Birth Rates In Mature Economies

4.3.4 Litigation Over NEC & Allergy Claims

4.4 Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers/Consumers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitute Products

4.7.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Product

5.1.1 Infant Formula

5.1.2 Baby Food

5.2 By Form

5.2.1 Powder

5.2.2 Liquid Concentrate

5.2.3 Ready-to-Feed (RTF)

5.3 By Ingredient

5.3.1 Cow-milk based

5.3.2 Goat-milk based

5.3.3 Plant-based & Hydrolyzed Protein

5.3.4 Functional Additives (HMOs, DHA/ARA, Lactoferrin, Probiotics)

5.4 By Distribution Channel

5.4.1 Hypermarkets & Supermarkets

5.4.2 Pharmacy & Drug Stores

5.4.3 Convenience & Departmental Stores

5.4.4 E-commerce & D2C Subscriptions

5.5 By Geography

5.5.1 North America

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- 5.5.1.1 United States
- 5.5.1.2 Canada
- 5.5.1.3 Mexico
- 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Italy
 - 5.5.2.5 Spain
 - 5.5.2.6 Rest of Europe
- 5.5.3 Asia Pacific
 - 5.5.3.1 China
 - 5.5.3.2 Japan
 - 5.5.3.3 India
 - 5.5.3.4 South Korea
 - 5.5.3.5 Australia
 - 5.5.3.6 Rest of Asia Pacific
- 5.5.4 Middle East & Africa
 - 5.5.4.1 GCC
 - 5.5.4.2 South Africa
 - 5.5.4.3 Rest of Middle East & Africa
- 5.5.5 South America
 - 5.5.5.1 Brazil
 - 5.5.5.2 Argentina
 - 5.5.5.3 Rest of South America

6 Competitive Landscape

6.1 Market Concentration

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.3.1 Abbott Laboratories

6.3.2 Nestle S.A.

6.3.3 Danone S.A.

6.3.4 Reckitt Benckiser Group Plc (Mead Johnson)

6.3.5 Royal FrieslandCampina N.V.

6.3.6 Bellamy's Organic

6.3.7 The Kraft Heinz Company

6.3.8 Perrigo Company Plc

6.3.9 Synutra International Inc.

6.3.10 A2 Milk Company Ltd.

6.3.11 Hero Group

6.3.12 Arla Foods amba

6.3.13 Fonterra Co-operative Group Ltd.

6.3.14 Ausnutria Dairy Corporation Ltd.

6.3.15 Inner Mongolia Yili Industrial Group

6.3.16 China Feihe Ltd.

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6.3.17 Beingmate Baby & Child Food Co.

6.3.18 HIPP GmbH & Co. Vertrieb KG

6.3.19 Dana Dairy Group Ltd.

6.3.20 Baby Gourmet Foods Inc.

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

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