FrieslandCampina Ingredients

THE INSIDE MATTERS



Feeding the future:

4 shifts transforming infant and children's nutrition

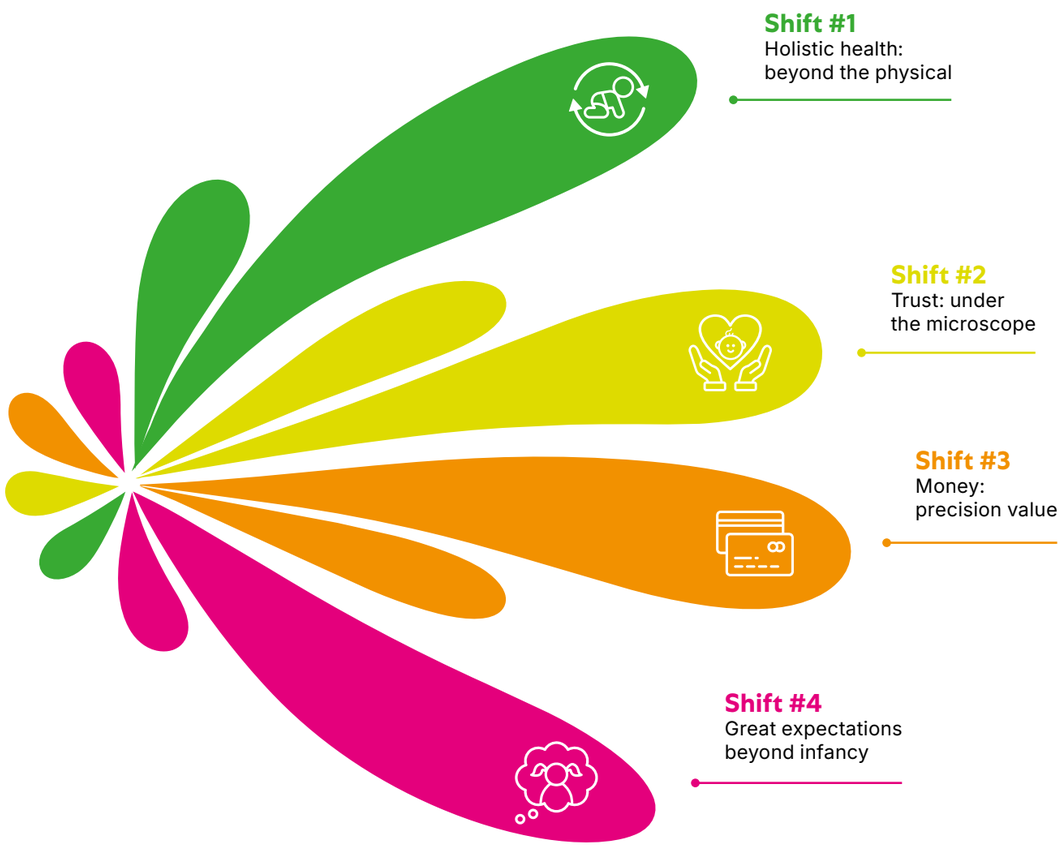
The new parent equation

Every parent wants the best for their children. This instinct is universal, but what it looks like in practice is continually evolving.

Today's parents are navigating a landscape unlike previous generations; with ripple effects that will shape future parents too. They're faced with an unprecedented amount of nutritional advice on- and offline. Every feeding pattern, sleep cycle and developmental milestone can be tracked and analysed.

The pressure to make the 'right' call, from the very first feed all the way to the teenage years, has never felt more intense.

Understanding what shapes these decisions is one of the most important challenges facing the infant and children's nutrition industry today. Drawing on extensive research, consumer insights and years of experience in early life nutrition, we've identified four key shifts affecting how parents think about what they feed their children, from day one and beyond. These include their approach to health and wellbeing, their need for trust and safety in the brands and products they choose, the economic realities determining what they can (and will) spend and their expectations about what good nutrition should mean for their child's development, happiness and future.



Shift #1 – Holistic health: beyond the physical

Gut health and microbiome focus rising, post-covid immune health awareness, demand for personalised nutrition, broader "whole body" wellbeing expectations.

Shift #2 – Trust: under the microscope

Higher scrutiny of ingredients and claims, misinformation and digital scepticism, demand for transparency and traceability, reliance on experts and online communities, strong regulatory environment.

Shift #3 – Money: precision value

Cost-of-living pressures, value-seeking and trade-down behaviours, essential vs discretionary spend, focus on pack-size and 'shrinkflation', later parenthood driven by career, housing costs and lifestyle prioritisation.

Shift #4 – Great expectations beyond infancy

Preventative nutrition from early life, desire for products that "grow with the child", wellbeing across multiple life stages, flexible and appealing formats.



While none of these shifts are new, what has changed is the wider social and economic landscape affecting how parents interpret and prioritise these factors – from information overload to financial pressure and rising expectations around wellbeing.

These structural shifts are already rewriting purchasing decisions across the early life nutrition market. For brands that have historically focused on infant formula alone, long-term relevance is strengthened by addressing parental preferences across a larger span of childhood, not just the first year of life. And against a backdrop of flattening birth rates in several key markets, this shift is becoming more pronounced.

This report explores each of these four influences in depth, discussing the trends and context shaping decisions within them. It draws on market signals, regulatory developments and consumer behaviour to give those building the brands of tomorrow a clear view of where parental expectations are heading – and what it takes to meet them at every age and stage.

Jouke Veldman
Global Marketing Director – Early Life Nutrition at FrieslandCampina Ingredients

SHIFT #1

Holistic health: Beyond the physical

Redefining what “healthy” means

The mindset shift

Health is no longer defined by the absence of illness. It has become something more ambitious – a fluid, evolving concept that looks different depending on who you ask and how old their child is. For this generation of informed parents, health is multi-dimensional. It means how well a child sleeps, how they concentrate in class, how resilient their gut is to disruption and what their metabolic health will look like in twenty years’ time. Physical health is becoming harder to separate from mental wellbeing too, with parents believing that better holistic health can make a difference to how their children feel every day.[2]

Conscious parenting – the idea that every decision affecting an infant and child’s development deserves active, informed consideration – has become a defining characteristic of Millennial and Gen Z parenthood from the moment little ones are born. These are parents who research ingredients and follow nutrition experts on social media, rather than relying on passive brand trust or recommendations alone. Over 80% of parents of young children now use social media for parenting advice,[3] meaning they arrive at the grocery store already armed with ideas and expectations.

With so much information at their fingertips, parents are choosing to take a preventative approach to illness, rather than responding to health problems as they arise. They’re asking themselves how the formula choices they make now will affect the immune systems, gut microbiomes and growth patterns their children will carry into later childhood and even adulthood. One example of this preventative approach is the growing uptake of specialty infant formulas, with parents increasingly opting for products designed to address common health concerns – such as colic – in case issues arise.

Immunity is consistently the top health concern cited by parents, alongside growth and development and digestive health.[4] But these priorities are not confined to infancy. Research shows that gut health and immunity remain top of mind for parents of children aged 3–12 too,[5] making ingredients that support these functions – from prebiotics* like galacto-oligosaccharides (GOS) to bioactive proteins like MFGM – relevant well beyond the formula aisle.

>80%
of parents consider the effects food has on mental performance, ability to learn, attention, behaviour and mood.[1]

64%
of US parents believe that nutrition in early life can strongly impact their child’s future success.[6]

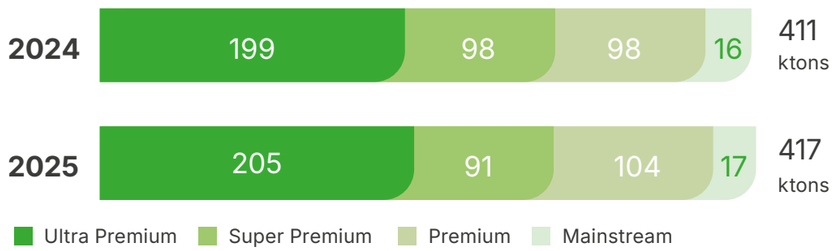


Growing preferences for premium formula

Parents are increasingly choosing infant formulas with added functional benefits to make their little ones feel their best – leading to a rise in a ‘premium’ category, which also includes specialty formulas such as hypoallergenic, partially hydrolysed, anti-reflux and comfort options. This is especially true of markets like China, where premium formulas are growing in popularity. The Chinese Ultra-Premium infant formula segment outperformed other price tiers in 2025, including mainstream infant milk formula, driven by demand for clinically proven ingredients such as HMOs and bioactive proteins.

Market share: premium infant formula segment in China (2024-2025)

IMF volumes reported by Nielsen (MBS+FP+B2C excl. CBEC) (ktons)



China’s ultra-premium segment grew by 3% in volume from 2024 to 2025.

This appetite for functional differentiation is a signal of broader parental priorities, and one that is increasingly visible across global markets.

SHIFT #2

Trust: Under the microscope

Rebuilding trust with traceability and transparency

A quantitative study found scepticism in German parents towards commercial infant foods, particularly around nutritional quality, potential contaminants and texture. Benefit beliefs and trust in the industry were key decision-making factors.[8]

Trust has always mattered in infant nutrition. But against a backdrop of geopolitical tension, conflict, economic volatility and public health crises, the world that today's parents are raising children in feels less stable than the one they grew up in. This has created an undercurrent of anxiety that shapes how parents think about every decision they make for children, including what they feed them – whether it's a bottle or an after-school snack. It means that trust is now being tested from all directions.

This is brought into sharp focus by recent infant milk formula recalls linked to cereulide contamination.[9] For many parents, it was a wake-up call that even established, widely distributed products could carry risk. The industry has responded with tighter quality controls, faster detection protocols and a greater focus on traceability.

The erosion of trust runs deeper than singular product safety incidents; it's shaped by a world where uncertainty can feel constant. COVID-19 was a turning point for many – a collective reminder that stability cannot be taken for granted. For parents, it fundamentally reset how they evaluate risk in everyday life.

"Parents are now just as worried about keeping their children safe online as they are about food quality and ingredient provenance – and these concerns will only grow in the future as social media becomes even more embedded in our lives. The scrutiny parents apply to a formula label is increasingly the same scrutiny they apply to a children's app, online advice or a digital health platform. They want to know where the information comes from, who stands behind it and how reliable it is."



Sophie Nicolas
Global Marketing Innovation Lead – Early Life Nutrition at FrieslandCampina Ingredients

In the context of infant and child nutrition, that shift has been enduring. Expectations have moved beyond "safe" formulations towards products that actively contribute to resilience. Parents want nutrition that does more, strengthening their children for whatever comes next. Demand for immunity products is a clear expression of this shift – 70% of parents say they are drawn to immunity claims on food and beverages.[10] It undoubtedly reflects a deeper parental instinct to protect.

As a result, parents are seeking products that support immune defence, resilience and strength, driving demand for ingredients with credible, evidence-backed roles in immune function, such as prebiotic GOS, and in healthy development, including proteins and omega-3s, like DHA. It links the trust conversation directly back to health: parents who see risks in the world look for products that make their children stronger within it.

For brands, closing trust gaps means demonstrating rigour at every level. Parents now expect clear visibility on ingredient sourcing, clinical evidence, characterisation and testing, as well as the internationally recognised standards governing those processes, such as AOAC International or GB national standards. That's why validated, harmonised analytical methods that hold up to regulatory scrutiny across multiple markets are the foundation on which parental confidence is built.

A data-heavy generation

As trust becomes more data-driven, parents are increasingly turning to measurable, real-time insights to validate the choices they make for their children.

Baby monitors with in-built sleep analytics, growth monitoring apps and AI-powered feeding diaries are increasingly popular tools. In fact, 71% of parents used at least one baby tracking application during 2025 for feeding, sleep, diaper and growth tracking.[11] At the same time, smartwatch wear has increased in children and teens, with usage ranging from 15% to 40% depending on the country of residence.[12]

This growing reliance on data reflects a broader shift in how trust in nutrition should be constructed – shaped by measurable inputs, continuous feedback and the reassurance of visible proof.

SHIFT #3

Money: precision value

Smarter decision making

The new value equation

The economic pressures shaping today's infant and children's nutrition market are coming from both ends of the supply chain. Geopolitical instability is disrupting ingredient supply chains and driving sourcing volatility. While trade tariffs and high fuel and logistics costs are adding further strain at every stage of production. For manufacturers, the challenge is maintaining product quality and ingredient integrity while absorbing or mitigating cost pressures from further upstream – and inevitably some of that pressure reaches the consumer.

What makes this moment particularly complex is that it is arriving at the same time as rising nutritional expectations. The cost-of-living crisis has made parents acutely conscious of what they spend on formula and children's nutrition products. And yet these financial pressures are often not translating into a willingness to compromise. Parents want products that deliver real, tangible functional benefits – but they are only willing to pay where the value is clear and easily justified.

56%
of parents say rising food costs have changed the way their family eats.[13]

This is rewiring how brands need to think about product development and communication. Functional benefits that were once the preserve of premium tiers are increasingly expected at varying price points – whether that means prebiotics that support gut health in a growing-up milk or bioactive proteins that contribute to immune function in an everyday formula. But parents need to be convinced that those benefits are real, meaningful, and worth paying for. The brands gaining ground are those that can make nutritional value unmistakable – clearly evidencing why a product is worth the spend in a market where every purchase is weighed against rising financial pressure.



Value is no longer defined by price alone. As household budgets come under greater pressure, parents are becoming more selective about where they spend and increasingly focused on getting the greatest nutritional return from every purchase. This is driving interest in solutions that can deliver multiple benefits within a single product, reducing the need to choose between affordability and functionality. At the same time, parents are showing a growing appreciation for ingredients that are naturally derived and closely aligned with the composition of human milk. As awareness of prebiotics grows, consumers are increasingly recognising that some ingredients can provide broader nutritional value than previously understood, combining established benefits with naturally occurring oligosaccharide structures also found in human milk. For many parents, this combination of proven functionality, nutritional sophistication and economic practicality increasingly represents what good value looks like in modern infant and children's nutrition.



"Across the infant and children's nutrition market, we're seeing a clear shift in what parents expect for their money. It's no longer enough to signal quality through price or packaging. Parents want to know what a product actually does, such as the specific functional benefits it delivers and the science that supports those claims. Products that can demonstrate clear, evidence-based value are the ones earning loyalty, regardless of where they sit on the price spectrum."

Annie Yang
Marketing Lead China – Early Life Nutrition
at FrieslandCampina Ingredients

SHIFT #4

Great expectations beyond infancy

Re-thinking childhood nutrition from toddlers to teens

New parenting patterns

Parental expectations of infant nutrition begin long before the first feed. Many have an idea of being the "perfect" parent until parenthood hits. Today's parents – predominantly Millennials and older Gen Z – have arrived at parenthood later than any previous generation. The average age of first-time parents has risen steadily over the last three decades.[14] Economic pressure, shifting social norms and longer educational and career pathways have all contributed to this delay. As a result, many parents come to parenthood with more established lifestyles, longer-held world views and stronger expectations around the decisions they make for their children. Having grown up firmly in the information age, anxiety and aspiration sit side by side, as they want to provide the best nutritional choice for their infant or child – especially in such an uncertain world.

In the infant formula market, this dynamic is already visible. Parents are increasingly seeking products that go beyond standard nutrition, with demand focused on credible functional benefits, transparent ingredient sourcing and substantiated claims. This is reflected in the continued strength of premium and specialty formula segments globally, where trust and perceived quality remain key purchase drivers.[15] Despite declining birth rates in many regions, infant nutrition remains a high-involvement category, with parents placing significant emphasis on each decision they make.

This focus doesn't diminish as children grow up – it simply shifts as their nutritional needs evolve across life stages. From rapid cognitive development in toddler years, to the physical demands of middle childhood and the hormonal changes of adolescence, each stage brings distinct requirements. Parents are increasingly responding by incorporating fortified foods and dietary supplements into their children's routines, reflecting a growing expectation that nutrition should actively support health and development at every age. Yet the children's nutrition category has historically struggled to span this full spectrum, leaving a gap between evolving needs and what the market offers.

Brain health spotlight: language matters

Cognitive health has become a defining concern of modern parenthood. Globally, 54% of parents cite brain health as a top worry for young children[18] – and that concern evolves rather than fades with age, shifting towards school performance, social development and emotional wellbeing. Our research found that while parents want solutions that support brain health, claims resonate more when linked to tangible benefits like mood, focus, sleep and stress. Clinical terminology can create distance, making outcome-led language such as "learning ability", "focus" and "keeping up at school" more effective.[19]

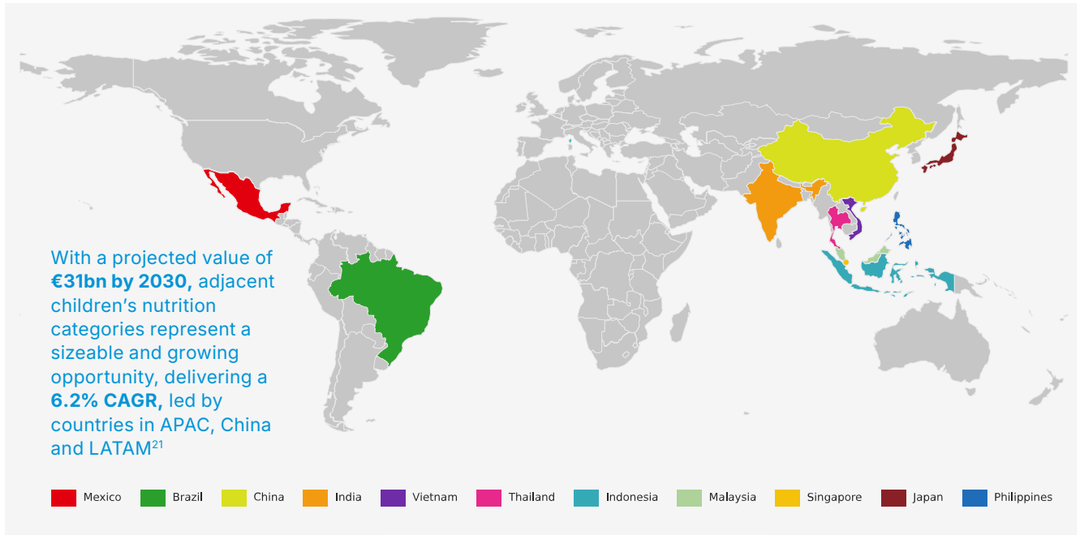
63% of kids currently take multivitamins

32% of kids consume nutrition drinks

77% of parents who give their children supplements say they are important to overall nutrition

Growth and development are the most common reasons for parents to give their kids supplements[16]

Modern lifestyles are adding a further layer of complexity to what parents expect from nutrition solutions. Time-pressed parents don't necessarily want to compromise their personal priorities, from workouts to hard worn career milestones, to meet their child's needs. So, they're looking for solutions that enable both – particularly convenience-led options that effortlessly support nutrition. Research shows that parents across the globe value all-in-one supplements: small, convenient solutions that combine multiple vitamins, minerals and functional ingredients into one serving.[17]



Children's nutrition market focus

The children's nutrition segment – aged 3-12 years – is growing, especially in APAC, China and LATAM, where premium kids' nutrition has strong cultural and commercial traction. Formula use in some parts of the region extends well beyond infancy, reflecting a deeply embedded belief in the long-term value of nutritional support.

Raise the bar: Staying relevant in infant and children's nutrition

The four umbrella forces mapped in this report are already in play, and parents are beginning to respond and prioritise their nutrition efforts accordingly. In this context, brands will need to invest across their capabilities and communication to credibly deliver – and demonstrate – the value they claim.



Technologically

The priority is delivering nutritional quality. Minimal processing approaches that preserve the efficacy of bioactive components during processing will be key to product success. Emerging non-thermal technologies offer improved safety and shelf life without compromising nutritional profile – increasingly valuable as the regulatory spotlight and consumer expectations intensify.



Socially

There is a growing need to better translate the role of nutrition – especially in areas like mental and emotional health. Much of this space remains under-communicated due to overly clinical language or stigma, creating an opportunity to reframe benefits in more accessible terms such as "better focus", "calmer nights" and "emotional resilience".



Scientifically

Robust, science-backed evidence is now a baseline requirement for credibility, alongside deeper ingredient characterisation – understanding exactly what is present, in what form and at what level. This forms the foundation for substantiated claims and regulatory compliance.

The era of change

As well as shaping parents' choices, these four shifts should shape product development and brand strategy. Ingredient choices, scientific substantiation and packaging – from stage 1 infant formula through to the foods that fuel children through their school years – all provide an opportunity to build more trust with parents. This is particularly important as rising expectations around transparency and provenance mean parents are actively seeking ingredients that are well-established, well-understood and backed by a strong safety and efficacy record.

Functional ingredients that can be incorporated cost-effectively into infant milk formulas, as well as children's food and beverage formats, will be key to success in a demanding market. Ingredients with strong safety profiles and well-established evidence across life stages will be particularly important, supporting both regulatory confidence and parental trust.



This includes GOS, with growing evidence across age groups and recognised benefits for gut health and digestive wellbeing, as well as bioactive proteins, like MFGM and lactoferrin, which can help address key parental priorities around immunity and cognitive development.

In a market defined by health, trust, value and expectations, brands serious about building loyalty from the first feed and sustaining it into childhood need formulation strategies and ingredient partners that work across the full age range.



Want to know what these trends means for your brands? Visit our website to find out more about our prebiotics and proteins.

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*The scientific definition of a prebiotic is a substrate that is selectively utilized by host microorganisms conferring a health benefit (Gibson GR, et al. Expert consensus document: The International Scientific Association for Probiotics and Prebiotics (ISAPP) consensus statement on the definition and scope of prebiotics. Nat Rev Gastroenterol Hepatol. 2017 Aug;14(8):491-502.). Whether the claim ‘prebiotic’ can be used on consumer products depends on local legislation.

FrieslandCampina Ingredients
EARLY LIFE NUTRITION

This information is intended for B2B professionals only. Breastfeeding is the best nutrition for healthy growth and development of babies. Potential consumer benefits are not to be considered as health claims. They should be considered as potential leads that might be developed into health claims complying with the local legal requirements. The information contained herein is, to the best of our knowledge, correct. The data outlined and the statements are intended only as a source of information. No warranties, expressed or implied, are made. On the basis of this information it is suggested that you evaluate the product on a laboratory scale prior to use in a finished product. FrieslandCampina is not liable for any IP infringement resulting from the use of the information contained herein.

The Netherlands
Stationsplein 4
3818 LE Amersfoort
The Netherlands
Tel: +31 (0)33 713 33 33

Asia-Pacific
50 Raffles Place #24-03/05
Singapore Land Tower
Singapore 048623

China
2506, West tower of Twin Towers
B12 Jianguomenwai Ave,
Chaoyang Dist.
Beijing 100022 China
Tel: +86 10 6566 6099

North America
61 S. Paramus Road, Suite 535
Paramus, NJ 07652, USA
Tel: +1 551 497 7300

Latin America
Rua Fradique Coutinho
30 – 6° – Cj. 61
Condomínio Edifício
WinWork
Pinheiros
05416-000 São Paulo, Brasil
Tel: +55 11 2395-1700

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