

NIQ × momCOZY

2026 U.S. Mother & Baby Market Trends

Understanding Moms,
Rethinking Consumption

New Growth Opportunities in the Mother & Baby Market Amid Shifting Consumer Behavior

Ongoing inflation and rising childcare costs are reshaping the spending structure of U.S. households. Data shows that childcare-related expenses continue to account for an increasing share of total household spending. At the same time, childcare costs have risen significantly faster than overall inflation, placing additional pressure on families and directly impacting women's employment patterns and workplace participation.

Against this backdrop, consumption in the mother and baby category is undergoing a fundamental shift.

As time and energy become increasingly constrained, consumer demand for mother and baby product is moving away from category expansion and broad product exploration, and toward solutions that reduce decision-making effort and provide greater certainty in outcomes.

In an environment defined by overlapping financial pressures, physical and mental strain, and increasing decision complexity, the key question for brands becomes: What are the most critical drivers of growth in today's mother and baby market?

Based on these dynamics, NIQ identifies key shifts in consumer behavior, outlines structural trends in the category, and provides forward-looking guidance to support strategic decision-making for brands and industry stakeholders.

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- Pew Research (2024). 5 facts about child care costs in the U.S. <https://www.pewresearch.org/short-reads/2024/10/25/5-facts-about-child-care-costs-in-the-us>
 - Bank of America (2025) The many costs of childcare. <https://institute.bankofamerica.com/economic-insights/childcare-costs.html>

Executive Summary

As consumer needs continue to evolve, mother and baby brands are transitioning from single-product solution providers to integrated parenting support systems and service ecosystems.

This report uses multi-dimensional data and case analysis to highlight this transformation and identify new areas of value creation.



01

Moms remain the primary decision-makers, with stress relief as the core purchasing driver

Although working mothers are now the norm in the U.S., they continue to carry the primary responsibility for caregiving at home and therefore lead purchasing decisions in the category. Under the dual pressures of work and parenting, reducing stress and effort has become a central priority. Brands must recognize the realities of moms' daily lives and optimize products and services accordingly.

02

Consumption is shifting from individual products to high-frequency, scenario-based system solutions

Feeding and sleep, two of the most frequent daily caregiving activities, drive strong demand across related product categories and shape consistent usage habits. At the same time, the continuity and interconnection of these tasks are pushing brands to move beyond single-product offerings toward integrated, end-to-end solutions across scenarios.

03

Information overload is increasing decision anxiety, making clarity and ongoing support critical

The abundance of information and uncertainty around product fit significantly increase decision anxiety and create friction in the purchasing process. Consumers are not only seeking clearer and more accessible information but also relying on brands to reduce the effort required to determine whether a product meets their needs. As a result, brand trust is shifting from standalone product performance to long-term support that combines professional guidance and emotional reassurance.

04

AI is emerging as a key parenting assistant, with clear expectations around its role

AI is increasingly supporting parenting by acting as a "second brain," helping users process information, manage schedules, and reduce cognitive load. However, consumers expect technology to play a supportive role rather than a supervisory one. Future competitiveness will depend on delivering non-intrusive, intelligently designed assistance that enhances efficiency while preserving user control.

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Who Buys & Why: Mom-Led, Relief-Driven

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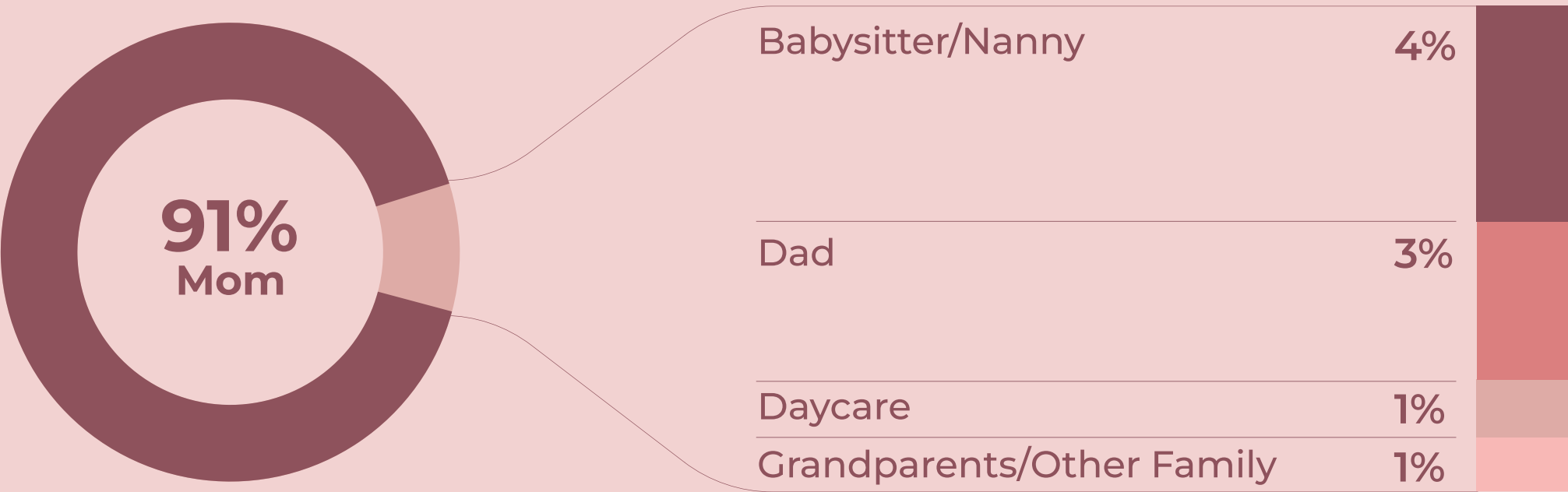
Moms' Dual Role: Primary Caregivers and Active Participants in the Workforce

Research confirms that mothers remain the central caregivers in U.S. households. 91% of respondents identified themselves as the primary caregiver, while partners, extended family members, and childcare providers play supporting roles. As the primary holders of caregiving responsibility, changes in mothers’needs directly shape the direction of the mother and baby product market. At the same time, working mothers have become the mainstream:

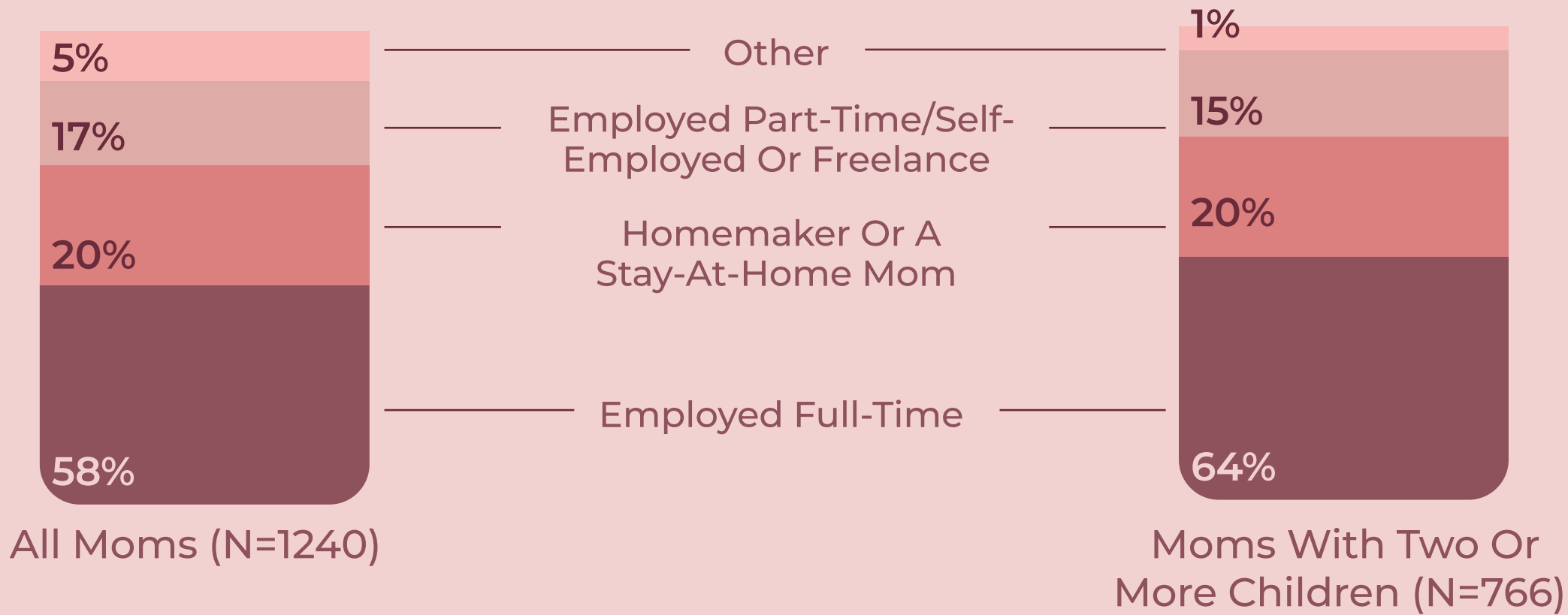
- **58%** of all mothers are employed full-time
- Among mothers with two or more children, this increases to **64%**

This reflects the growing reality that mothers are simultaneously managing the demands of intensive parenting and sustained workforce participation.

Primary caregiver of children (N=1120)



Employment status of mothers (N=1240)

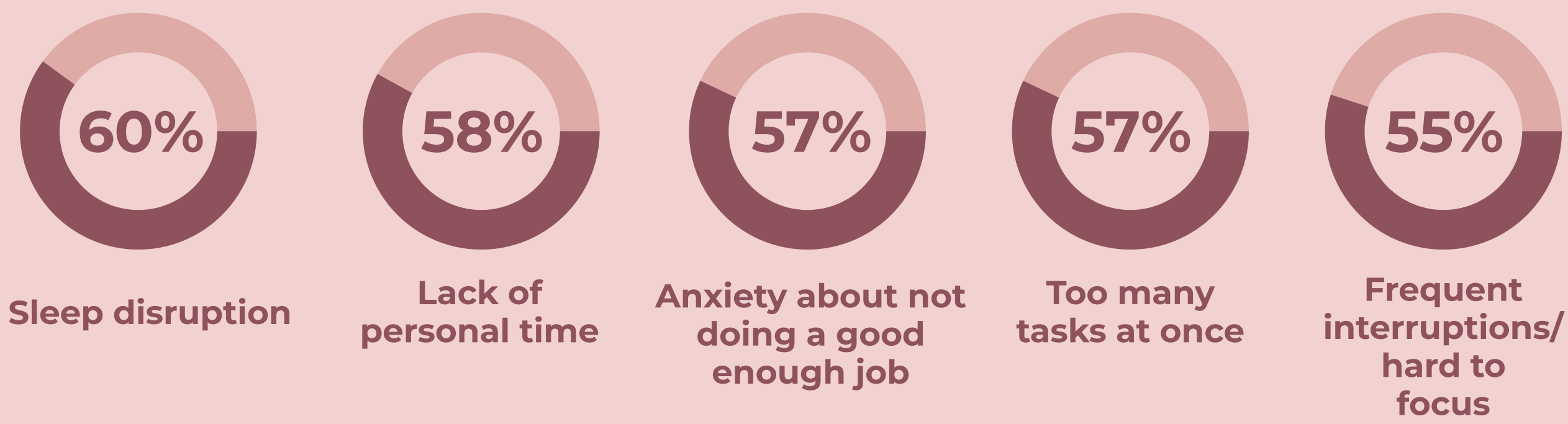


• Data source: Q78a. Distribution of household caregiving responsibilities; Q14. Occupation

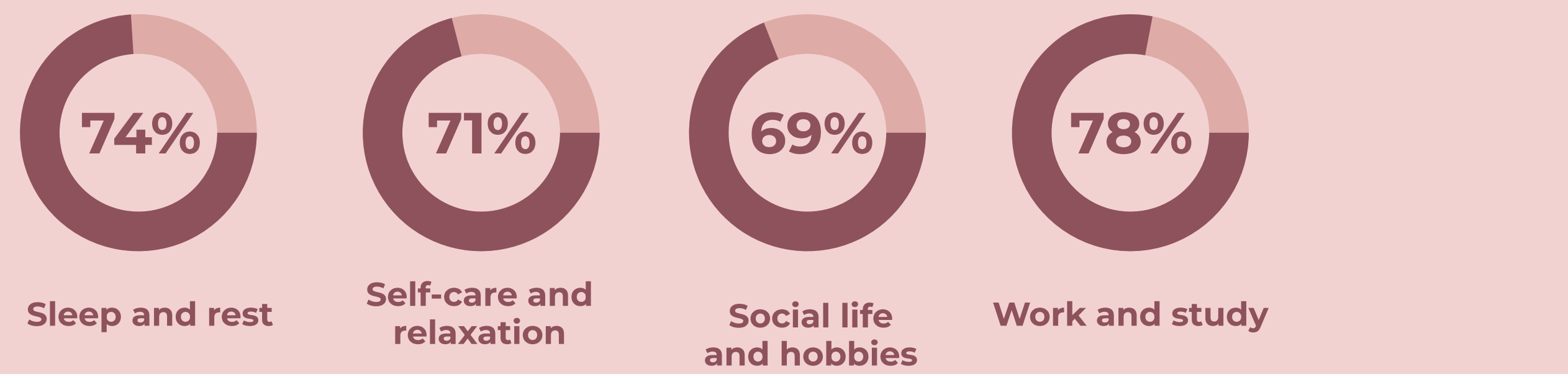
Dual Parenting Burden: Physical Fatigue and Mental Strain

Mothers today face both physical and mental pressures. Frequent nighttime wake-ups (e.g., for feeding, diaper changes, and soothing) disrupt sleep and lead to ongoing physical fatigue. At the same time, limited personal time and concerns about whether they are “doing enough” create significant emotional strain. Compared to life before childbirth, mothers’ time becomes more fragmented and frequently interrupted. This results in less time for sleep, self-care, and social activities, further increasing overall stress. In this context, reducing stress, saving time, and minimizing effort have become critical factors in how mothers make purchasing decisions in the mother and baby category.

Sources of parenting stress for mothers N=1120



Sources of parenting stress for mothers N=1120



Mom's sleep dilemma

- Data source: Q51a. Sources of parenting stress; Q78c. Changes in time structure
- University of Illinois Study: " How mother and infant sleep patterns interact during the first two years of life"
- NIH (National Institutes of Health) PMC Database: Research on postpartum sleep duration and sleep efficiency

3+ Times

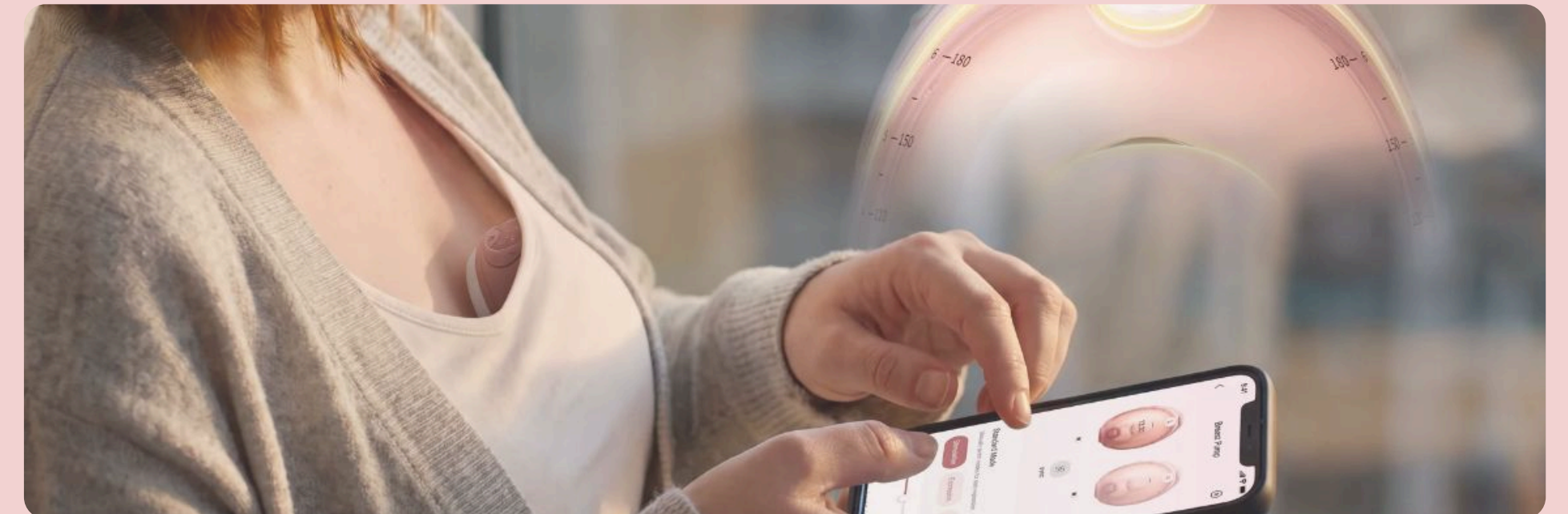
Average number of nighttime awakenings due to feeding, diaper changes, and soothing

5.7 Hours

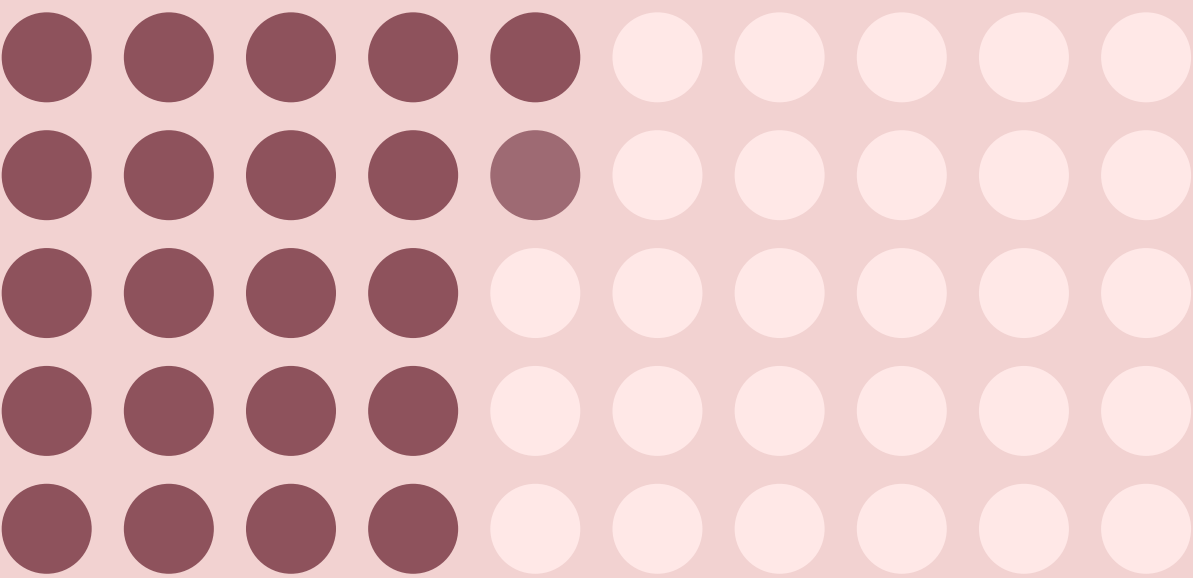
Average nightly sleep duration for new moms

Responding to the Need for Stress Relief: Product Design That Reduces Real-Life Parenting Burden

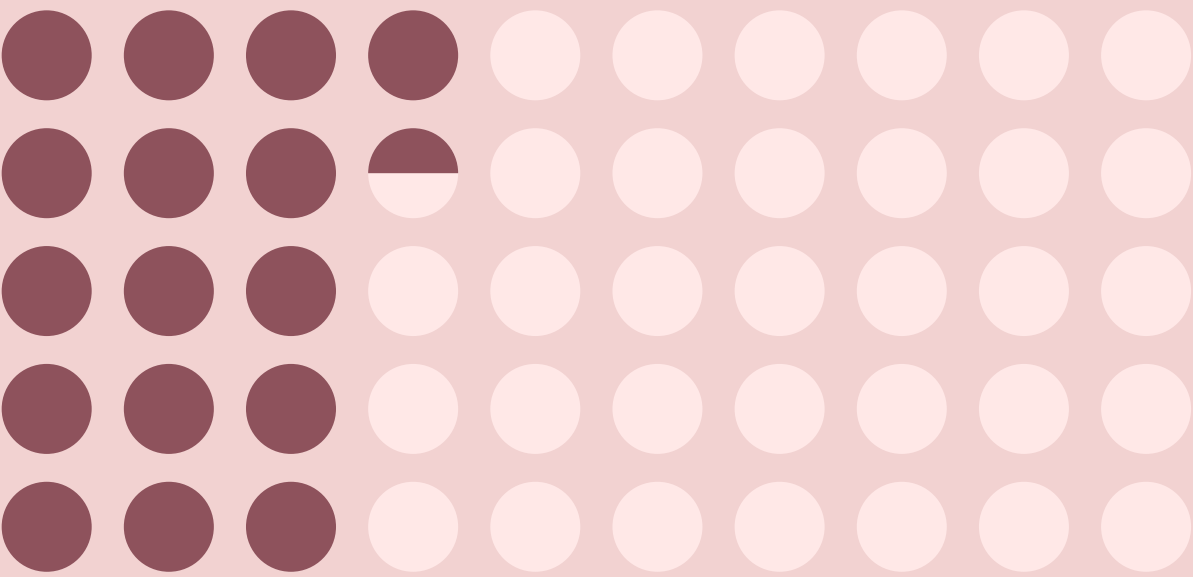
- As mothers face both physical and mental demands, their expectations for mother and baby products are clear: reduce effort, save time, and ease daily routines. This demand for “stress relief” is reshaping product design. Brands are moving away from solutions that require time, attention, and physical effort, and toward tools that simplify repetitive tasks and adapt to different caregiving situations.
- For example, traditional breast pumps often require mothers to remain in one position and operate them by hand, which can lead to physical strain. Wearable breast pumps remove these constraints by enabling hands-free use and greater mobility. This allows mothers to pump while moving freely, reducing strain on the shoulders, neck, and arms, and making the experience more manageable overall. Features such as app control, heating, massage, and the simulation of infant feeding patterns further improve comfort and usability.
- Similarly, for high-frequency tasks like cleaning bottles and pump parts, automated solutions such as bottle washers combine washing, sterilizing, and drying into a single process. These products reduce manual effort while also easing the mental burden of managing repetitive daily chores.



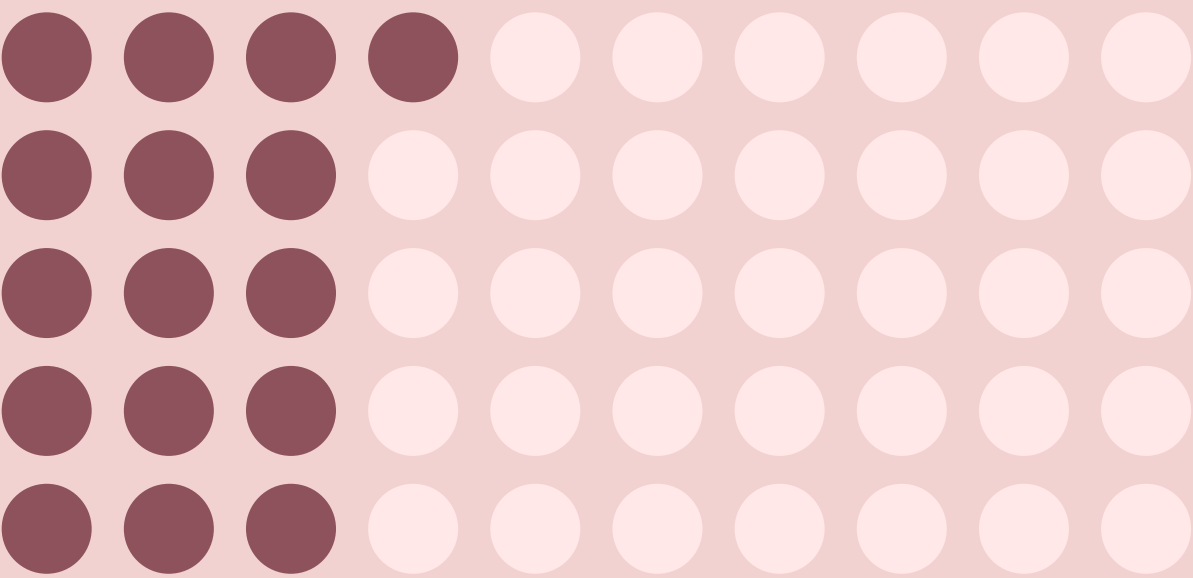
Mom's expectation for mother and baby products N=1240



42%
Expect products to be more comfortable and easier to operate
Reduce physical burden



33%
Expect to reduce steps and effort required in daily care



32%
Expect to reduce care tasks and save time

Manual intervention time required for washing baby bottles (minutes/day)



70mins
Hand washing



3mins
Using a Bottle Washer

Using a baby bottle washer can save 67 minutes per day

• Data source: Q55. • Decision drivers
• Centers for Disease Control and Prevention (CDC). (2023). How to Clean, Sanitize, and Store Infant Feeding Items.

A close-up photograph of a woman with blonde hair holding a newborn baby. The woman is looking down at the baby with a gentle expression. The baby is wrapped in a light blue blanket. A large, thick, pink number '2' is overlaid on the right side of the image, partially covering the woman's face and the baby. The background is a soft, out-of-focus grey.

What to Buy: High-Frequency Scenario-Driven Systematic Solutions

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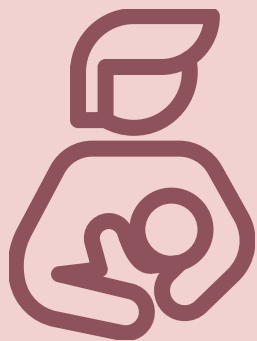
High-Frequency Scenarios—Feeding and Sleep—Drive Category Demand

Daily parenting is built around a small set of repeated, high-frequency tasks, primarily **feeding** and **sleep care**. **Nearly all mothers (98%)** report that these two areas make up the core of their daily caregiving routines.

- **Feeding** includes pumping, bottle preparation, feeding, and cleaning
- **Sleep care** includes soothing, managing night wakings, and nighttime feeding

Mapping the structure of moms' core caregiving scenarios and corresponding product category penetration

Top 3 high-frequency feeding scenarios



63%
Breastfeeding or pumping



59%
Washing and sterilizing bottles, nipples, environment, etc.

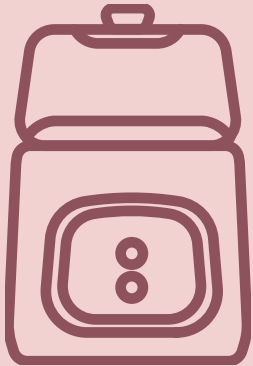


58%
Bottle feeding or solids feeding

Top 3 feeding-related product categories by penetration rate



72%
Breast pump



65%
65% Bottle sterilizer (with cleaner)



65%
Bottle warmer

Frequent and
unavoidable

98%
of moms reported that their caregiving tasks are mainly related to infant feeding and sleep care.

• Data source: Q78b. Core caregiving tasks (N=1120); Q12. Current product categories owned (N=1240)

Because these activities happen multiple times a day, and often at night, they create consistent, ongoing demand for products that support them. As a result, product categories closely tied to these scenarios—such as breast pumps, bottle washers, bottle warmers, cribs, and baby monitors—see the highest levels of adoption. The more frequent and essential the task, the greater the need for reliable, easy-to-use solutions.

Mapping the structure of moms' core caregiving scenarios and corresponding product category penetration

Frequent and unavoidable

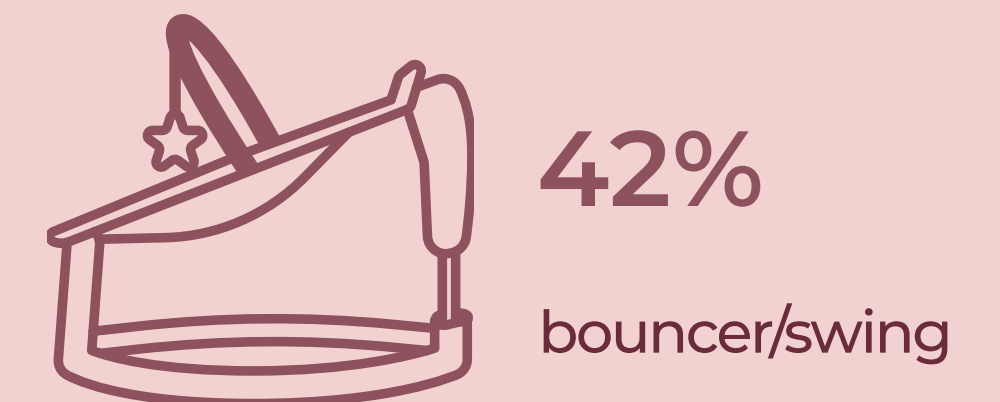
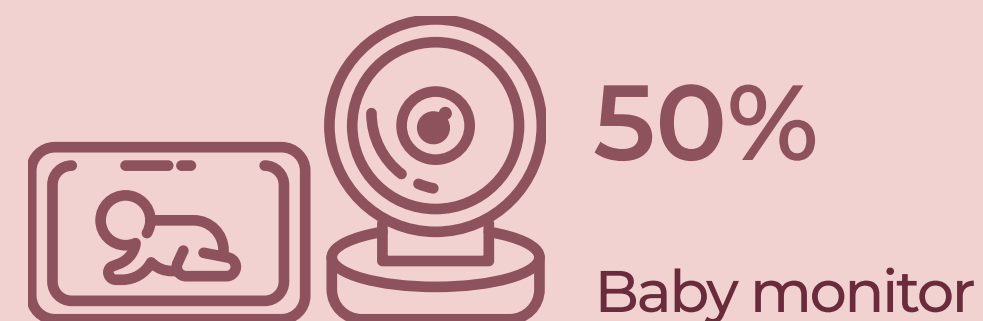
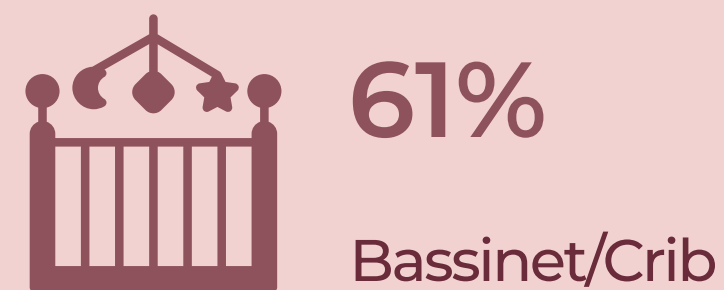
98%

of moms reported that their caregiving tasks are mainly related to infant feeding and sleep care.

Top 3 high-frequency sleep care scenarios

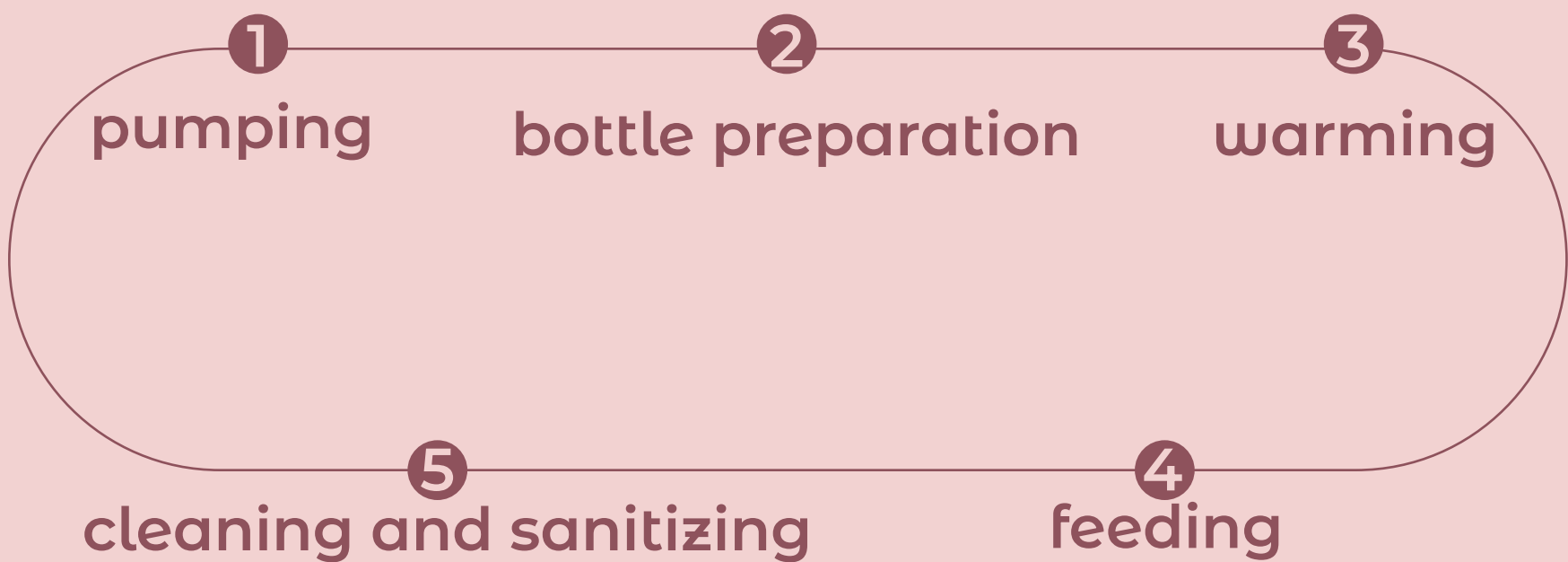


Top 3 sleep-related product categories by penetration rate



Systematic Solutions: Closing the Loop Across the Feeding Journey

Feeding is not a single action—it is a continuous workflow:



No single product can support this entire process. As a result, mothers are increasingly looking for **solutions that work across the full caregiving flow**, rather than isolated tools for individual tasks.

Momcozy has recognized this need by building a product portfolio that spans multiple stages of the feeding journey, from wearable breast pumps to milk storage, bottle warming, and cleaning solutions. By connecting these products, the brand transforms separate tasks into a more seamless, end-to-end system.

More broadly, the role of brands is evolving. They are no longer just providers of individual products, but **partners delivering integrated solutions across the full feeding journey**—from pumping to feeding, cleaning, and storage.



Sleep as a System: From Individual Products to Connected Ecosystems



Sleep Scenarios Are Becoming Integrated Systems

Sleep is one of the most frequent and essential parts of daily caregiving. Today, it is evolving from single-product use to connected solutions built around:



Infant sleep is not a single step, but a continuous process—including soothing, maintaining sleep, and ensuring nighttime safety. No single product can meet all of these needs. As a result, mothers are increasingly looking for integrated solutions that support the full sleep journey.

When the baby is falling asleep, products like the SNOO Smart Sleeper Bassinet actively respond to a baby’s needs by detecting crying and automatically rocking and playing white noise—shifting the crib from passive support to active soothing, while reducing the need for manual intervention.

During sleep, monitoring is evolving from simply “seeing” to understanding and alerting. Solutions like Nanit use computer vision to analyze sleep patterns, while Owlet tracks heart rate and oxygen levels through wearable devices—extending monitoring from behavioral observation to physiological safety.

Sleep is no longer supported by individual products—it is managed through connected systems that combine environment, intelligence, and automation.

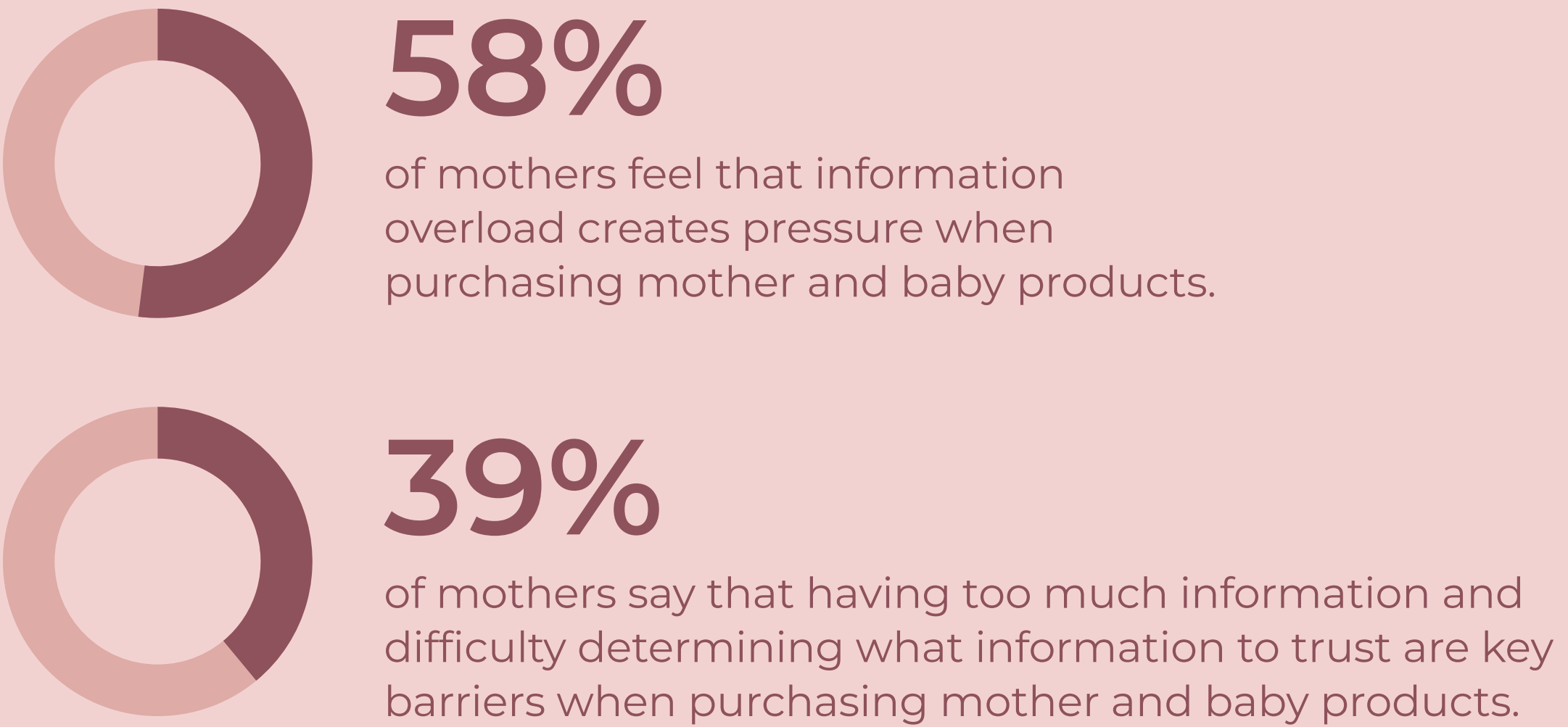
Decision Drivers: Shifting Trust Under Information Overload

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Decision Anxiety in the Age of Information Overload

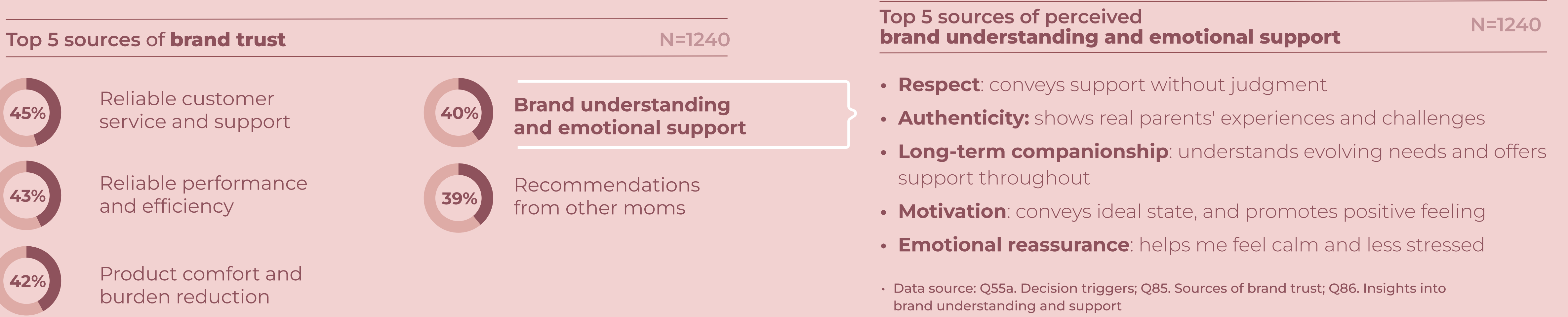
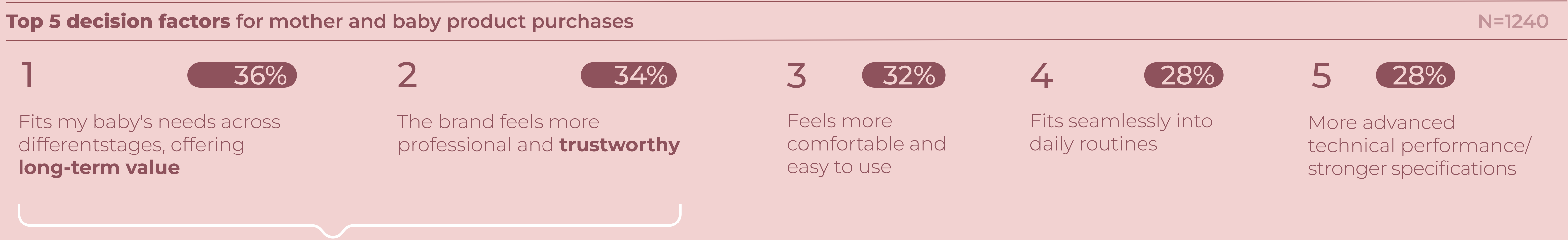
In today’s digital environment, information is abundant, but not always helpful. Mothers consult an average of 3.3 information sources when purchasing mother and baby products. However, more information is not leading to better decisions.



Rebuilding Trust: From Product Performance to Long-Term Support

Mothers are increasingly making decisions with a long-term mindset. Long-term product value is now the top purchase driver and trust in brands has expanded beyond performance and comfort to include service, understanding, and emotional support. Today, brand trust is built not only on what a product does, but on how well a brand supports mothers over time.

As a result, brands are expected to go beyond products and services— they must become trusted partners in mothers’ daily lives.

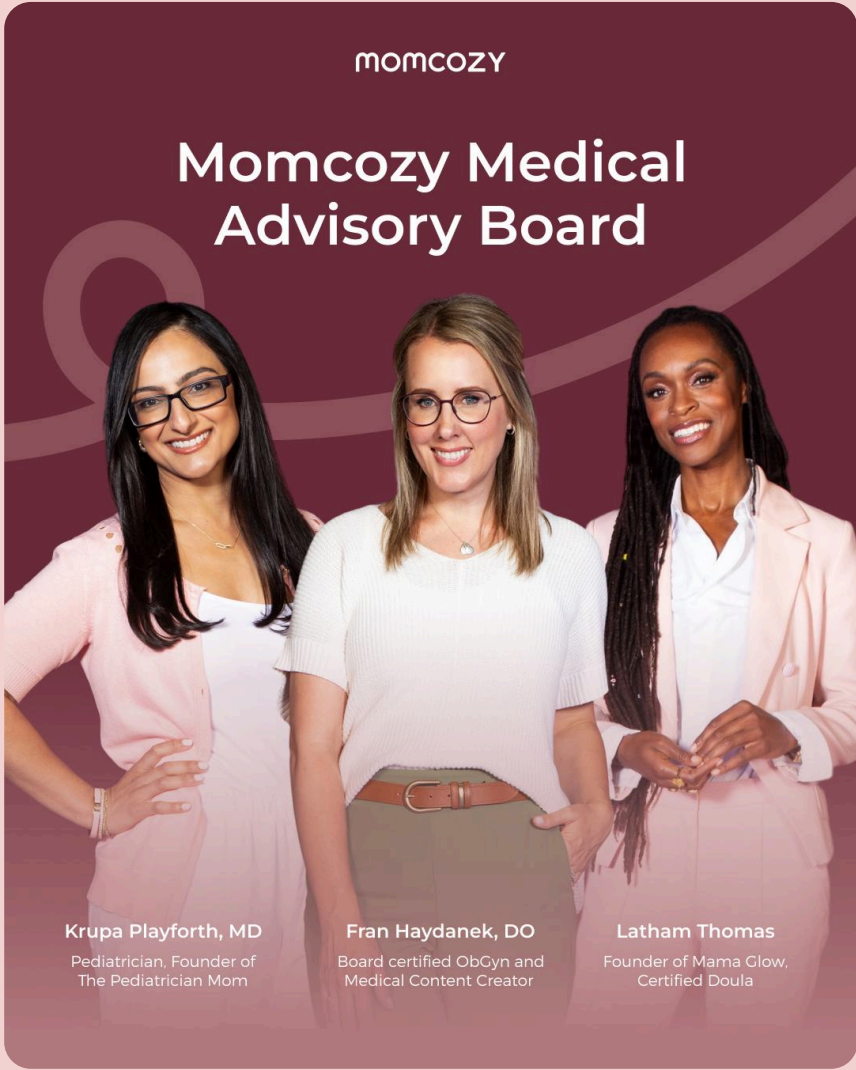


Building Trust Through Professional and Emotional Support

Trust in the mother and baby category is no longer built on products alone—it is built through **ongoing support across the parenting journey**. By combining expert guidance, credible institutions, and real community experiences, brands can reduce mothers’ anxiety, lower trial-and-error costs, and build stronger, more lasting relationships. At its core, trust today comes from delivering both: **Professional support** — credible, expert-backed guidance and **Emotional support** — understanding, reassurance, and connection

Momcozy’s deep understanding of mothers’ real-life challenges has enabled it to build a full-circle support system—spanning professional resources, emotional connection, and product experience.

- **The Momcozy Care Program** brings together expert resources and long-term partnerships with healthcare professionals, including a Medical Advisory Board, to provide credible and structured support
 - Initiatives like the collaboration with Mom First offer practical tools for working mothers, extending support beyond products
 - Ongoing webinars, expert Q&As, community engagement, and offline events provide mothers with continuous access to guidance, connection, and reassurance
- Together, these efforts create **a trusted, accessible support ecosystem** that extends into mothers’ daily lives.



How AI Is Reshaping Parenting: Relief in Practice & The Evolution of Boundaries

PART

AI in Parenting: Reducing Mental Load and Supporting Daily Coordination

Artificial intelligence (AI) is becoming an increasingly important tool in parenting, helping mothers reduce research fatigue and manage daily responsibilities more efficiently. AI delivers value across three key areas:

- **Information curation** — summarizes reviews, reduces information overload, and supports decision-making
- **In-the-moment support** — provides real-time guidance in caregiving situations, while also offering reassurance and access to resources
- **Task and schedule management** — automates reminders and tracking, reducing the need for manual monitoring

By taking on information processing and routine tracking, AI helps reduce cognitive load, enables faster daily decisions, and increases mothers’ sense of control and confidence.

How moms are using AI today:

AI assistants (e.g., ChatGPT)		App-based intelligent automation	
Core actions	Value	Core actions	Value
• Summarizing information from multiple sources • Asking questions like “Is this normal?” in a low-pressure environment	• Reduces information overload • Provides a judgment-free space • Maintains privacy without external scrutiny	• Summarizing information from multiple sources • Asking questions like “Is this normal?” in a low-pressure environment	• Reduces information overload • Provides a judgment-free space • Maintains privacy without external scrutiny

• Joint insights by NIQ and Momcozy (2026). Parenting in the Age of AI.

AI in Parenting: Defining the Right Role Builds Trust

- Mothers’ acceptance of AI depends on the role it plays.
- They embrace tools that **support without adding burden**, and reject those that feel intrusive or controlling.
- As a result, how AI is designed—not just what it does—directly shapes trust.
- AI is most effective when it strengthens mothers’ sense of control and confidence, rather than replacing their decisions.

Supportive AI
(ideal model)

How it works

- Intervenes only when needed (e.g., when risks are detected)
- Acts as a “second brain” to handle small, routine tasks
- Keeps final decision-making with the mother

Impact on trust

- Builds deeper trust and long-term reliance
- Improves overall ease and comfort of use
- Strengthens confidence in daily decision-making

Supervisory AI
(must be avoided)

How it works

- Requires frequent interaction and monitoring
- Attempts to evaluate parenting behavior or performance
- Overrides the mother's authority in decision-making

Impact on trust

- Breaks trust and discourages continued use
- Creates feelings of guilt or resistance
- Reduces sense of safety and brand loyalty

AI in Smart Parenting: Balancing Safety and Privacy

In smart parenting hardware, over-intervention and the feeling of being constantly monitored can quickly erode trust. Parents want technology that **reduces caregiving burden without compromising privacy or control**.

Example The Momcozy BM04 Baby Monitor brings the concept of “supportive AI” to life through a non-intrusive user experience:

- **AI safety detection** Identifies high-risk situations such as entering danger zones, face covering, and prone sleeping to enhance safety monitoring
- **Critical alerts** only Sends alerts only when potential risks are detected, reducing unnecessary notifications in daily use
- **Privacy and control Supports** both Wi-Fi and local offline modes, giving users full control over data storage and transmission

By combining safety detection with user-controlled data, this approach reduces anxiety while maintaining trust in the home environment.



What's Next: Three Trends & Suggestions

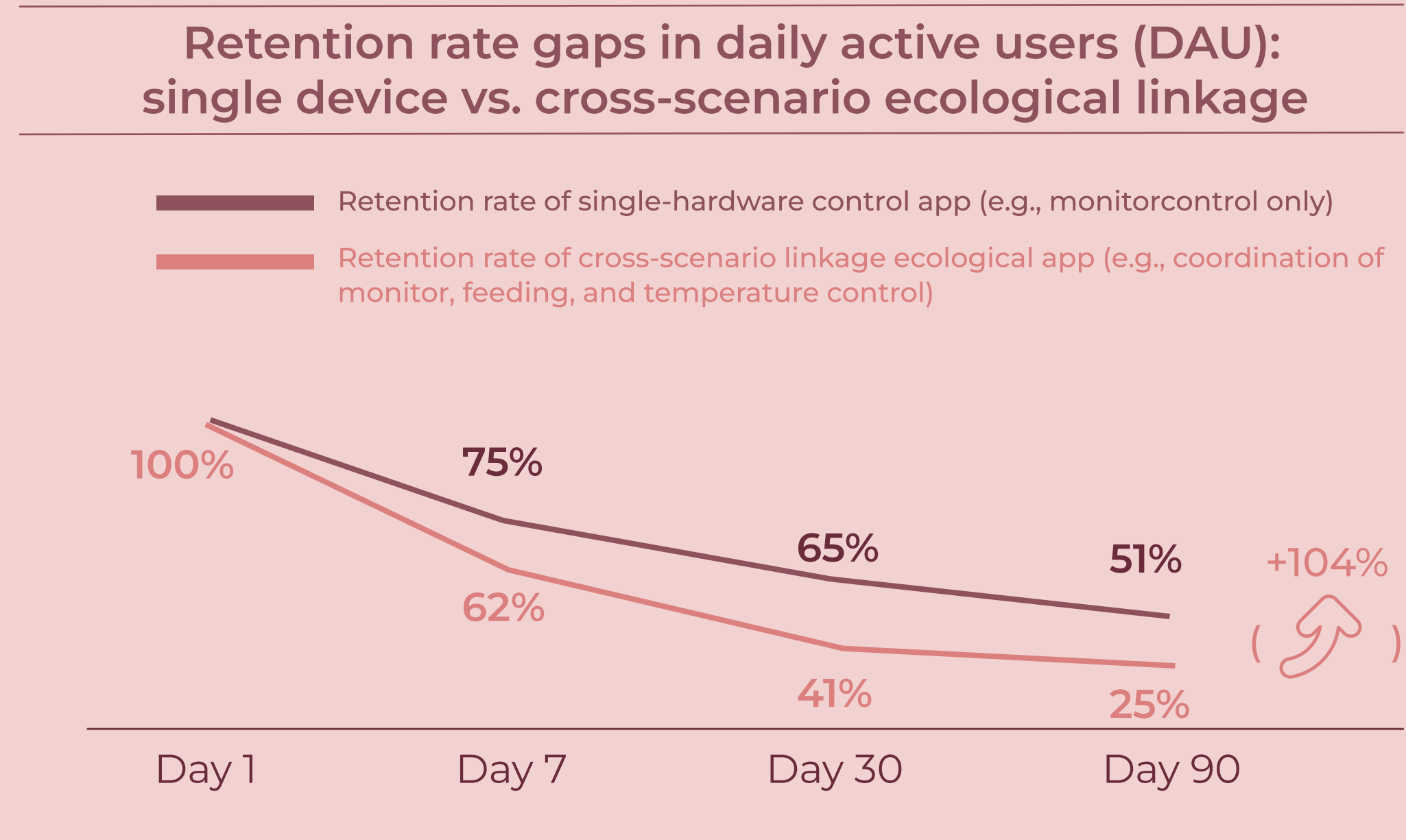
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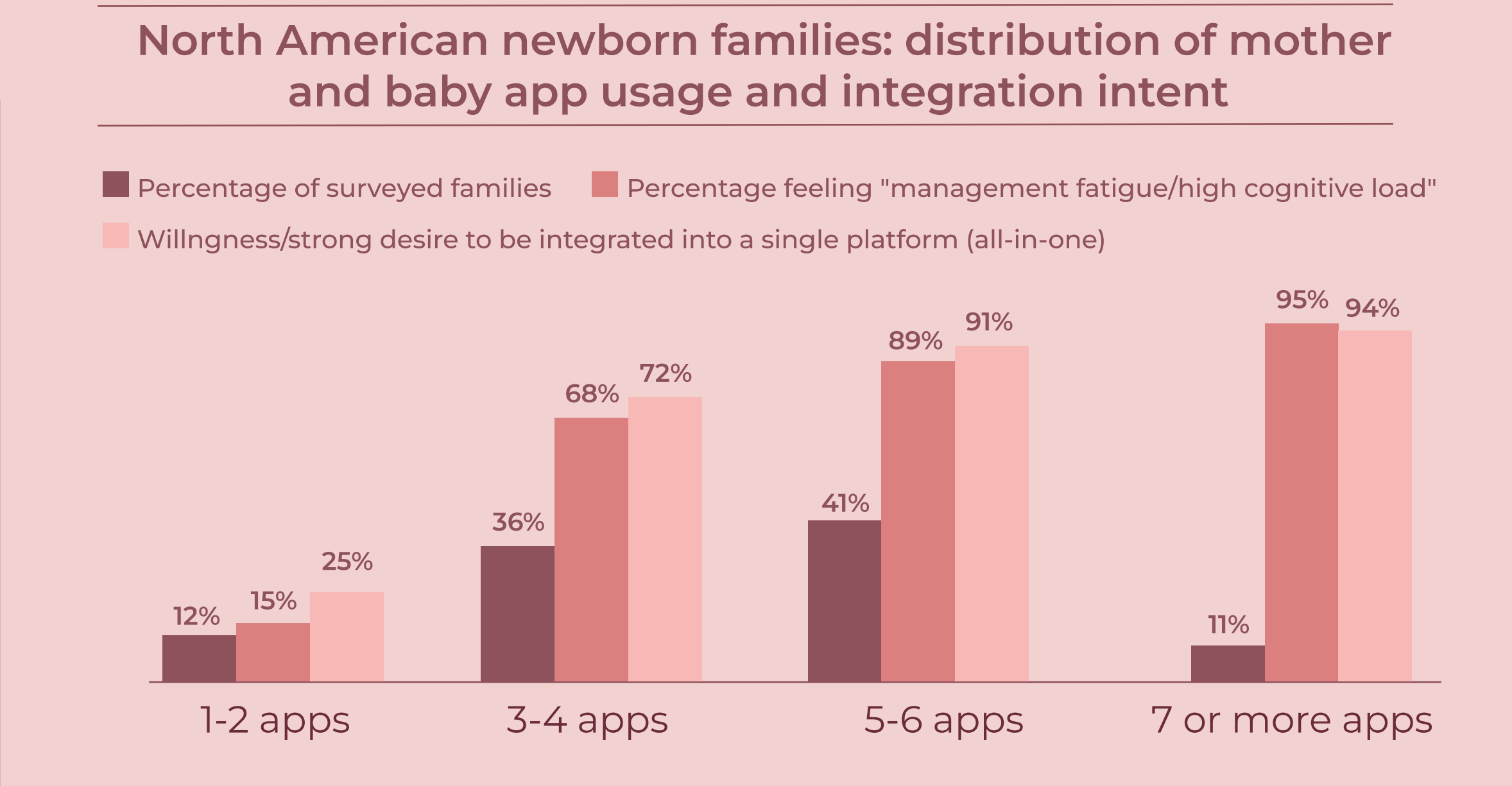
Product Opportunity: From Standalone Tools to Connected Ecosystems

Future growth will come from connecting products, data, and experiences across the parenting journey. Brands need to move beyond standalone devices and build **end-to-end ecosystems** that integrate hardware and software seamlessly. For example, feeding data can inform sleep predictions, and postpartum recovery insights can connect to nutrition guidance—creating a more continuous and personalized experience. At the same time, the rapid growth of parenting apps has introduced a new challenge: **“app fatigue.”** Managing multiple disconnected apps increases cognitive load and fragments the parenting experience. To address this, brands should focus on building systems that:

- **connect data across devices and use cases**
 - **reduce the need for multiple apps**
- **create a more seamless, continuous experience**
 - The future lies in delivering a **connected parenting ecosystem** that simplifies, rather than adds to, the mental load.



• Parks Associates. (2025). Smart Home and Baby Tech: The Demand for Ecosystem Integration.



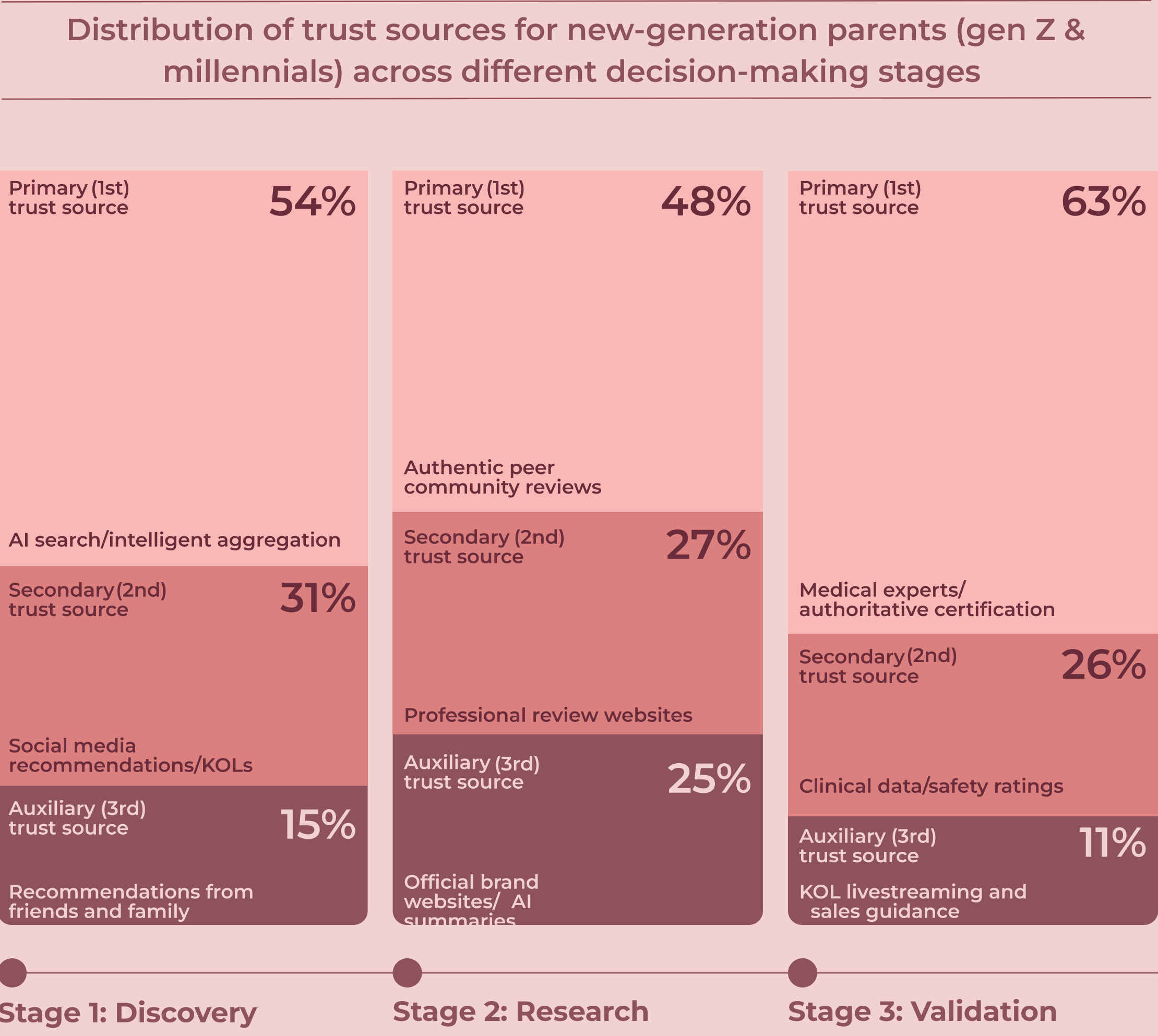
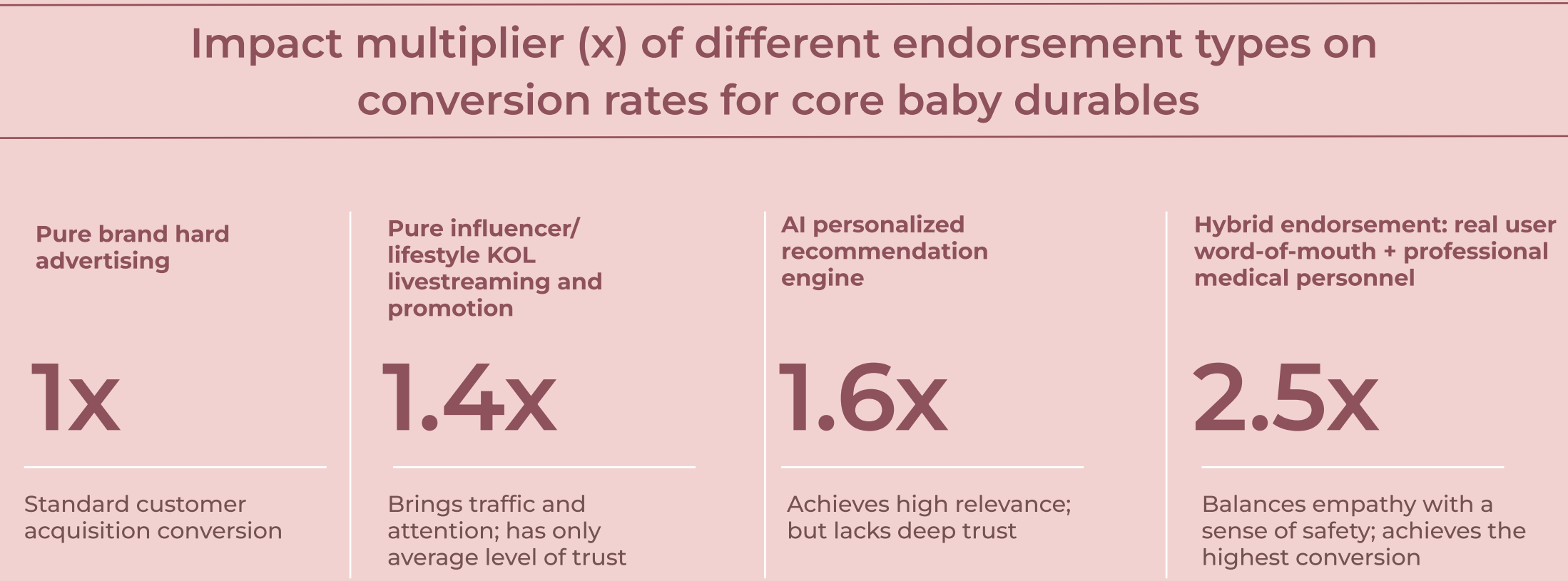
• Flurry Analytics & Sensor Tower. (2024). Parenting App Retention and Engagement Report.
• Statista Industry Insights. (2025). Global Smart Baby Care Market Outlook.

How Trust In Brands Is Built Today: AI, Experts, and Real User Voices

Trust in the mother and baby category has evolved. It has shifted from personal experience, to expert opinion, and now to a combined model that brings together:

- **AI-driven efficiency** — faster, more personalized information
- **Expert credibility** — professional and medical validation
- **Real user voices** — authentic experiences and recommendations

AI helps parents process information quickly, but **trust is built through human credibility and real-life experience**. The challenge for brands is to balance **technology and human connection**—delivering both speed and reassurance. The most effective approach is a **layered trust model** that combines AI, experts, and community voices.



• Gartner. (2024). Consumer Decision Journeys in High-Involvement Categories: The Trust Multiplier.

• Edelman. (2025). Trust Barometer Special Report: Brands, AI and the Future of Parenting.

• McKinsey & Company. (2024). Marketing Spend Trends in the US Baby Care Industry.

Brand Opportunity: From Transactions to Long-Term Relationships

The relationship between parents and brands is shifting—from one-time purchases to long-term connection.

A brand’s strength will no longer be defined by market share at a single moment, but by its ability to build **trust, emotional resonance, and ongoing relevance** over time.

Brands that recognize real parenting challenges, provide meaningful support, and grow with families across life stages can build deeper loyalty, stronger word-of-mouth, and higher lifetime value.

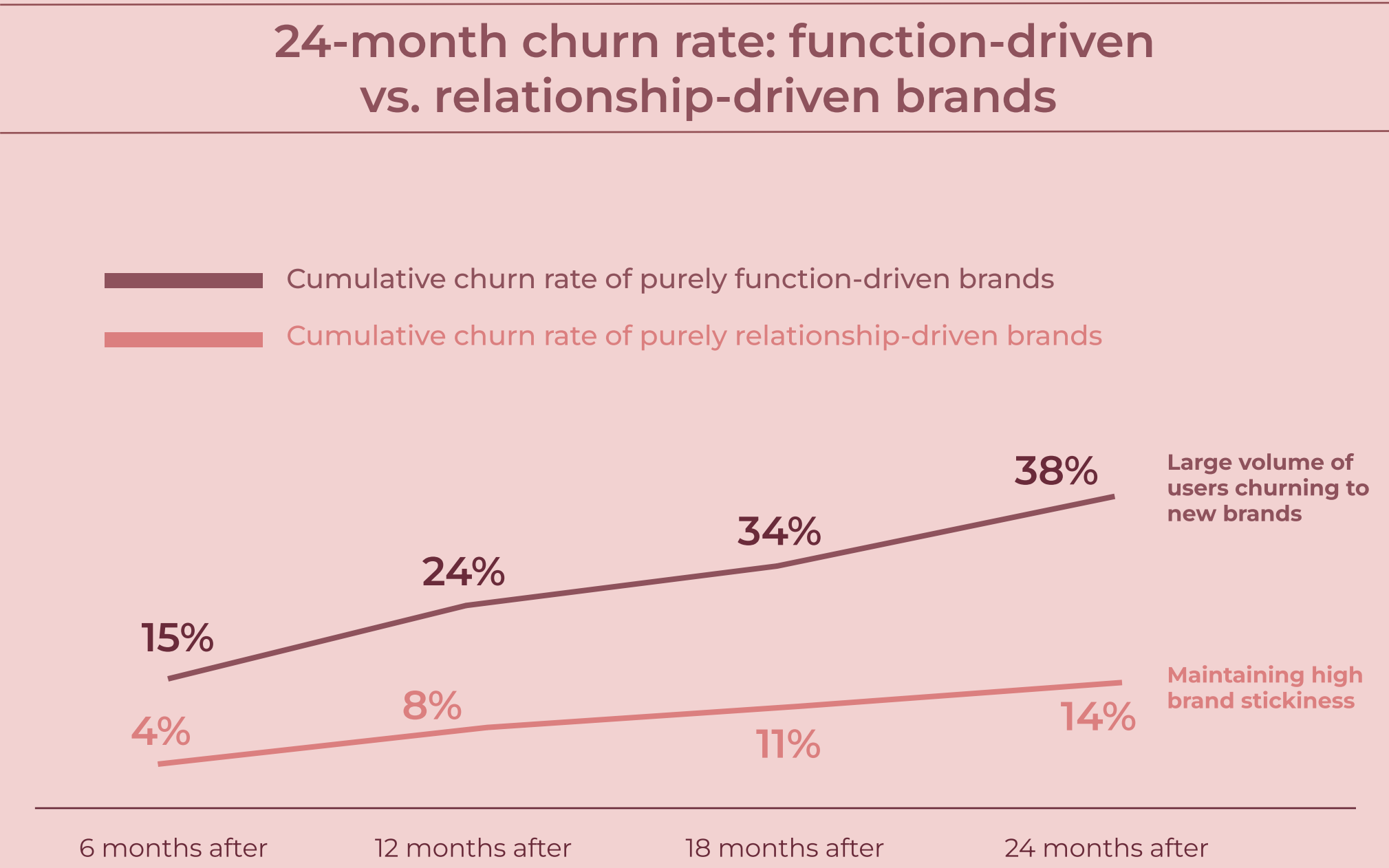
Over time, emotional connection becomes a key competitive advantage—helping brands retain customers, withstand market fluctuations, and sustain premium positioning.

Tiered model of emotional connection depth vs. customer lifetime value (LTV)			
Consumer emotional tier	Definition of emotional connection and behavioral characteristics	Relative lifetime value index (LTV index)	Tolerance for brand price premium
Unconnected	Purchases solely due to price drops or promotions; no brand loyalty	100 (baseline)	0% (extremely price-sensitive)
Highly satisfied	Approves product functionality and value for money, but emotional engagement remains shallow	145 (+45%)	5%
Fully connected	Resonates deeply with brand values; views the brand as a parenting partner	220 (+120%)	15% - 20%

• Harvard Business Review Analytic Services. (2023). The Science of Customer Emotions in Niche Markets.

• Bain & Company. (2024). Customer Loyalty and Retention in the Parenting Sector.

• NielsenIQ. (2025). Premiumization through Purpose: How Values Drive Baby Product Purchasing.



APPENDIX: METHODOLOGY

Research design

This research uses a quantitative online questionnaire methodology to systematically understand behavioral patterns and product usage among U.S. mothers in feeding and sleep care scenarios.

Sample overview

A total of N=1240 valid responses were collected, all from the U.S. market. Sample eligibility criteria:

- Female caregiver, aged 18–45
- Currently pregnant (first pregnancy) or with children aged 0–24 months
- Gross annual household income was quota-controlled in line with 2024 U.S. Census data.

Fieldwork Period

March 2026

Sampling method

Sampling method Respondents were recruited from NIQ's managed online consumer panel.

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