

CHAPTER ONE: INTRODUCTION.....	1
STUDY OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
INTENDED AUDIENCE.....	2
SCOPE OF THE STUDY.....	2
METHODOLOGY.....	2
INFORMATION SOURCES.....	3
ABOUT THE AUTHOR.....	3
RELATED BCC RESEARCH REPORTS.....	4
BCC ONLINE SERVICES.....	4
DISCLAIMER.....	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 5
EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL REVENUE OF THE BABY FOOD</i>	
<i>MARKET, THROUGH 2016 (\$ MILLIONS)</i>	6
<i>SUMMARY FIGURE GLOBAL REVENUE OF THE BABY FOOD</i>	
<i>MARKET, 2009-2016 (\$ MILLIONS)</i>	6
 CHAPTER THREE: OVERVIEW.....	 7
DEFINITIONS.....	7
TYPES OF BABY FOOD.....	8
NUTRIENT NEEDS.....	9
ENERGY REQUIREMENTS.....	9
<i>TABLE 1 ESTIMATED ENERGY REQUIREMENTS (EER) FOR</i>	
<i>INFANTS</i>	10
ENERGY INTAKE AND GROWTH RATE.....	10
FOOD REQUIREMENTS IN INFANT DIETS.....	11
CARBOHYDRATES.....	11
Sources.....	11
PROTEINS.....	11
Sources.....	12
LIPIDS.....	12
Sources.....	12
CHOLESTEROL AND FATTY ACIDS.....	13
Cholesterol.....	13
Sources.....	13
Trans Fats.....	13
Sources.....	13
Arachidonic Acid (ARA) and Docosahexaenoic Acid (DHA).....	14
Sources.....	14
FIBER.....	14
Sources.....	14
VITAMIN D.....	15

Sources	15
VITAMIN A	15
Sources	16
VITAMIN E	16
Sources	16
VITAMIN K	16
Sources	16
VITAMIN C	17
Sources	17
VITAMIN B12	17
Sources	17
FOLATE.....	17
Sources	18
VITAMIN B6 (PYRIDOXINE)	18
Sources	18
THIAMIN (VITAMIN B1).....	18
Sources	18
RIBOFLAVIN (VITAMIN B2)	18
Sources	19
NIACIN.....	19
Sources	19
CALCIUM.....	19
Sources	19
IRON	20
Sources	20
Other Milks	21
ZINC.....	21
Sources	21
SODIUM	21
Sources	22
WATER	22
Water and Renal Solute Load of Foods	22
Sources	22
FLUORIDE.....	23
Sources	23
<i>TABLE 2 DRI FOR INFANTS</i>	23
<i>TABLE 2 (CONTINUED)</i>	24
BREASTFEEDING	24
IMPORTANCE OF BREAST MILK.....	24
INFANT FORMULA FEEDING	25
HISTORY OF THE DEVELOPMENT OF INFANT FORMULAS	26
<i>TABLE 3 HISTORY OF COMMERCIALY AVAILABLE INFANT</i> <i>FORMULAS IN UNITED STATES</i>	27
TYPES OF INFANT FORMULA FEEDS	27

Milk-based Infant Formula	27
Iron-Fortified Infant Formula.....	27
Soy-Based Infant Formula	28
Hypoallergenic Infant Formula	28
Lactose-Free Infant Formula	28
Exempt Infant Formula	29
NUTRIENTS IN INFANT FORMULAS	29
Arachidonic Acid (ARA) and Docosahexaenoic Acid (DHA).....	29
Nucleotides, Prebiotics, and Probiotics.....	29
TYPES OF INFANT FORMULA.....	30
Ready-to-feed	30
Concentrated Liquid.....	30
Powder.....	30
<i>TABLE 4 ADVANTAGES AND DISADVANTAGES OF FORMULA</i>	
<i>FEEDING</i>	30
<i>TABLE 4 (CONTINUED)</i>	31
COMPLEMENTARY FOODS	31
DIFFERENT TYPES OF INDUSTRIALLY PREPARED	
COMPLEMENTARY FOODS	31
CATEGORIES OF COMMERCIALLY AVAILABLE BABY	
MEALS	32
Baby Cereals.....	32
Baby Snacks.....	32
Frozen Baby Foods	33
Other Baby Foods	33
<i>TABLE 5 ADVANTAGES AND DISADVANTAGES OF COMMERCIAL</i>	
<i>BABY MEALS</i>	34
CHAPTER FOUR: REGULATORY ASPECTS	35
CODEX STANDARD ON INFANT FORMULA	35
INTERNATIONAL CODE OF MARKETING OF BREAST MILK	
SUBSTITUTES.....	36
U.S. REGULATORY ENVIRONMENT FOR BABY FOODS	36
GRAS (GENERALLY RECOGNIZED AS SAFE)	37
GRAS Notice Inventory	37
<i>TABLE 6 LIST OF GRAS NOTICES, 2007–2011</i>	37
<i>TABLE 6 (CONTINUED)</i>	38
<i>TABLE 6 (CONTINUED)</i>	39
<i>TABLE 6 (CONTINUED)</i>	40
CANADIAN REGULATORY ENVIRONMENT FOR BABY FOODS	41
EU REGULATORY ENVIRONMENT FOR BABY FOODS.....	41
CONTROVERSIES/CONCERNS REGARDING THE USE OF	
COMMERCIAL BABY FORMULA AND FOODS	41
CONTAMINANTS IN FORMULA FEEDS.....	42
Contaminants in Formula Feeds (Continued).....	43

CONTAMINANTS IN WATER USED TO RECONSTITUTE CONCENTRATED AND POWDERED FORMULA.....	44
CONTAMINANTS INTRODUCED IN THE MANUFACTURING PROCESS.....	45
WRONG LABELS	45
DIRECTIVE 2006/125/EC AND DIRECTIVE 2006/141/EC	46
<i>TABLE 7 MAXIMUM LEVELS OF CONTAMINANTS FOR INFANTS AND YOUNG CHILDREN ACCORDING TO DIRECTIVE 2006/125/EC AND DIRECTIVE 2006/141/EC</i>	46
ISSUES RELATING TO BISPHENOL A (BPA)	47
ISSUES RELATING TO ...(CONTINUED).....	48
CHAPTER FIVE: MANUFACTURERS/ SUPPLIERS FOR BABY FOODS	49
INFANT FORMULA.....	49
<i>TABLE 8 LEADING MANUFACTURERS/SUPPLIERS OF INFANT FORMULA</i>	49
<i>TABLE 8 (CONTINUED)</i>	50
<i>TABLE 8 (CONTINUED)</i>	51
<i>TABLE 8 (CONTINUED)</i>	52
<i>TABLE 8 (CONTINUED)</i>	53
BABY MEALS	53
BABY CEREALS.....	53
<i>TABLE 9 LEADING MANUFACTURERS/SUPPLIERS OF BABY CEREALS</i>	53
<i>TABLE 9 (CONTINUED)</i>	54
<i>TABLE 9 (CONTINUED)</i>	55
BABY SNACKS	55
<i>TABLE 10 LEADING MANUFACTURERS/SUPPLIERS OF BABY SNACKS</i>	55
<i>TABLE 10 (CONTINUED)</i>	56
BABY DRINKS.....	56
<i>TABLE 11 LEADING MANUFACTURERS/SUPPLIERS OF BABY DRINKS</i>	56
<i>TABLE 11 (CONTINUED)</i>	57
OTHER BABY FOODS	57
<i>TABLE 12 LEADING MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS</i>	58
<i>TABLE 12 (CONTINUED)</i>	59
CHAPTER SIX: NEW DEVELOPMENTS	60
DRIVERS FOR NEW PRODUCT DEVELOPMENT	60
ENDEAVORS TO CREATE BABY MILK PRODUCTS CLOSER TO MOTHER'S MILK.....	60
INCREASED CONVENIENCE TO PARENTS	60

NUTRITIONAL REQUIREMENTS AND AWARENESS OF HEALTH BENEFITS	60
INCREASED CHOICES TO CONSUMERS.....	61
<i>TABLE 13 NEW PRODUCT DEVELOPMENTS (2007 TO AUGUST 2011)</i>	61
<i>TABLE 13 (CONTINUED)</i>	62
<i>TABLE 13 (CONTINUED)</i>	63
<i>TABLE 13 (CONTINUED)</i>	64
CHAPTER SEVEN: GLOBAL MARKETS FOR BABY FOODS	65
<i>TABLE 14 GLOBAL MARKET FOR BABY FOODS, THROUGH 2016 (\$</i> <i>MILLIONS)</i>	66
<i>FIGURE 1 GLOBAL MARKET FOR BABY FOODS, 2009-2016 (\$</i> <i>MILLIONS)</i>	66
MARKETS.....	67
INFANT FORMULA	67
Market Overview	68
Market Revenue	68
<i>TABLE 15 GLOBAL MARKET FOR INFANT FORMULA BY REGION,</i> <i>THROUGH 2016 (\$ MILLIONS)</i>	69
<i>FIGURE 2 GLOBAL MARKET FOR INFANT FORMULA BY REGION,</i> <i>2009-2016 (\$ MILLIONS)</i>	69
BABY MEALS	69
Baby Cereals.....	70
Market Overview	70
Market Revenue.....	71
<i>TABLE 16 GLOBAL MARKET FOR BABY CEREAL BY REGION,</i> <i>THROUGH 2016 (\$ MILLIONS)</i>	71
<i>FIGURE 3 GLOBAL MARKET FOR BABY CEREAL BY REGION,</i> <i>THROUGH 2016 (\$ MILLIONS)</i>	71
Baby Snacks.....	72
Market Overview	72
Market Revenue.....	72
<i>TABLE 17 GLOBAL MARKET FOR BABY SNACKS BY REGION,</i> <i>THROUGH 2016 (\$ MILLIONS)</i>	73
<i>FIGURE 4 GLOBAL MARKET FOR BABY SNACKS BY REGION, 2009-</i> <i>2016 (\$ MILLIONS)</i>	73
Baby Drinks	74
Market Overview	74
Market Revenue.....	75
<i>TABLE 18 GLOBAL MARKET FOR BABY DRINKS BY REGION,</i> <i>THROUGH 2016 (\$ MILLIONS)</i>	75
<i>FIGURE 5 GLOBAL MARKET FOR BABY DRINKS BY REGION, 2009-</i> <i>2016 (\$ MILLIONS)</i>	75
Other Baby Foods	76
Market Overview	76

Market Revenue	77
<i>TABLE 19 GLOBAL MARKET FOR OTHER BABY FOODS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	77
<i>FIGURE 6 GLOBAL MARKET FOR OTHER BABY FOODS BY REGION, 2009-2016 (\$ MILLIONS)</i>	78
REGIONAL MARKET SHARES.....	78
<i>TABLE 20 GLOBAL BABY FOOD MARKET SHARES BY REGION, 2010 (%)</i>	78
<i>FIGURE 7 GLOBAL BABY FOOD MARKET SHARES BY REGION, 2010 (%)</i>	79
MARKET SHARES BY CATEGORY.....	79
<i>TABLE 21 GLOBAL BABY FOOD MARKET SHARES BY CATEGORY, 2010 (%)</i>	79
<i>FIGURE 8 GLOBAL BABY FOOD MARKET SHARES BY CATEGORY, 2010 (%)</i>	80
CHAPTER EIGHT: THE NORTH AMERICAN MARKET	81
NORTH AMERICAN MARKET REVENUE	81
<i>TABLE 22 NORTH AMERICAN MARKET FOR BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	81
<i>FIGURE 9 NORTH AMERICAN MARKET FOR BABY FOODS, 2009-2016 (\$ MILLIONS)</i>	82
INFANT FORMULA.....	82
MARKET OVERVIEW.....	83
MARKET REVENUE.....	84
<i>TABLE 23 NORTH AMERICAN MARKET FOR INFANT FORMULA, THROUGH 2016 (\$ MILLIONS)</i>	84
<i>FIGURE 10 NORTH AMERICAN MARKET FOR INFANT FORMULA, THROUGH 2016 (\$ MILLIONS)</i>	85
BABY MEALS.....	85
BABY CEREAL	86
Market Overview	86
Market Revenue	87
<i>TABLE 24 NORTH AMERICAN MARKET FOR BABY CEREAL, THROUGH 2016 (\$ MILLIONS)</i>	87
<i>FIGURE 11 NORTH AMERICAN MARKET FOR BABY CEREAL, 2009-2016 (\$ MILLIONS)</i>	87
BABY SNACKS	88
Market Overview	88
Market Revenue	89
<i>TABLE 25 NORTH AMERICAN MARKET FOR BABY SNACKS, THROUGH 2016 (\$ MILLIONS)</i>	90
<i>FIGURE 12 NORTH AMERICAN MARKET FOR BABY SNACKS, THROUGH 2016 (\$ MILLIONS)</i>	90
BABY DRINKS.....	90

Market Overview	91
Market Revenue	91
<i>TABLE 26 NORTH AMERICAN MARKET FOR BABY DRINKS, THROUGH 2016 (\$ MILLIONS)</i>	91
<i>FIGURE 13 NORTH AMERICAN MARKET FOR BABY DRINKS, 2009- 2016 (\$ MILLIONS)</i>	92
OTHER BABY FOODS	92
Market Overview	92
Market Revenue	93
<i>TABLE 27 NORTH AMERICAN MARKET FOR OTHER BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	94
<i>FIGURE 14 NORTH AMERICAN MARKET FOR OTHER BABY FOODS, 2009-2016 (\$ MILLIONS)</i>	94
MARKET SHARES OF INDUSTRY LEADERS IN NORTH AMERICA.....	94
INFANT FORMULA	95
<i>TABLE 28 LEADERS OF THE NORTH AMERICAN INFANT FORMULA MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	95
<i>FIGURE 15 LEADERS OF THE NORTH AMERICAN INFANT FORMULA MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	95
BABY MEALS	96
Baby Cereals.....	96
<i>TABLE 29 LEADERS OF THE NORTH AMERICAN BABY CEREALS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	96
<i>FIGURE 16 LEADERS OF THE NORTH AMERICAN BABY CEREALS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	96
Baby Snacks.....	97
<i>TABLE 30 LEADERS OF THE NORTH AMERICAN BABY SNACKS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	97
<i>FIGURE 17 LEADERS OF THE NORTH AMERICAN BABY SNACKS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	98
Baby Drinks.....	98
<i>TABLE 31 LEADERS OF THE NORTH AMERICAN BABY DRINKS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	99
<i>FIGURE 18 LEADERS OF THE NORTH AMERICAN BABY DRINKS MARKET (MANUFACTURERS/SUPPLIERS), 2010 (%)</i>	99
Other Baby Foods.....	99
<i>TABLE 32 SHARES OF LEADING NORTH AMERICAN MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	100
<i>FIGURE 19 SHARES OF LEADING NORTH AMERICAN MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	100
CHAPTER NINE: THE EUROPEAN MARKET.....	101
EUROPEAN MARKET REVENUE	101

<i>TABLE 33 EUROPEAN MARKET FOR BABY FOODS, THROUGH 2016</i>	
(\$ MILLIONS).....	101
<i>FIGURE 20 EUROPEAN MARKET FOR BABY FOODS, THROUGH</i>	
2016 (\$ MILLIONS).....	102
INFANT FORMULA	102
Market Overview	103
Market Revenue	104
<i>TABLE 34 EUROPEAN MARKET FOR INFANT FORMULA, THROUGH</i>	
2016 (\$ MILLIONS).....	105
<i>FIGURE 21 EUROPEAN MARKET FOR INFANT FORMULA, 2009-2016</i>	
(\$ MILLIONS).....	105
BABY MEALS	105
Baby Cereal.....	106
Market Overview	106
Market Revenue.....	107
<i>TABLE 35 EUROPEAN MARKET FOR BABY CEREAL, THROUGH</i>	
2016 (\$ MILLIONS).....	107
<i>FIGURE 22 EUROPEAN MARKET FOR BABY CEREAL, THROUGH</i>	
2016 (\$ MILLIONS).....	108
BABY SNACKS	108
Market Overview	108
Market Revenue	109
<i>TABLE 36 EUROPEAN MARKET FOR BABY SNACKS, THROUGH</i>	
2016 (\$ MILLIONS).....	109
<i>FIGURE 23 EUROPEAN MARKET FOR BABY SNACKS, 2009-2016 (\$</i>	
MILLIONS).....	110
BABY DRINKS.....	110
Market Overview	110
Market Revenue	111
<i>TABLE 37 EUROPEAN MARKET FOR BABY DRINKS, THROUGH 2016</i>	
(\$ MILLIONS).....	112
<i>FIGURE 24 EUROPEAN MARKET FOR BABY DRINKS, THROUGH</i>	
2016 (\$ MILLIONS).....	112
OTHER BABY FOODS	112
Market Overview	113
Market Revenue	113
<i>TABLE 38 EUROPEAN MARKET FOR OTHER BABY FOODS,</i>	
<i>THROUGH 2016 (\$ MILLIONS).....</i>	114
<i>FIGURE 25 EUROPEAN MARKET FOR OTHER BABY FOODS, 2009-</i>	
2016 (\$ MILLIONS).....	114
MARKET SHARES OF EUROPEAN INDUSTRY LEADERS	115
INFANT FORMULA	115
<i>TABLE 39 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS</i>	
<i>OF INFANT FORMULA, 2010 (%)</i>	115

<i>FIGURE 26 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF INFANT FORMULA, 2010 (%)</i>	116
BABY MEALS	116
Baby Cereals.....	116
<i>TABLE 40 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY CEREALS, 2010 (%)</i>	117
<i>FIGURE 27 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY CEREALS, 2010 (%)</i>	117
Baby Snacks.....	117
<i>TABLE 41 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY SNACKS, 2010 (%)</i>	118
<i>FIGURE 28 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY SNACKS, 2010 (%)</i>	118
Baby Drinks	119
<i>TABLE 42 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	119
<i>FIGURE 29 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	119
Other Baby Foods	120
<i>TABLE 43 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	120
<i>FIGURE 30 SHARES OF EUROPEAN MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	120
CHAPTER TEN: THE ASIA-PACIFIC MARKET.....	121
ASIA-PACIFIC MARKET REVENUE.....	121
<i>TABLE 44 ASIA-PACIFIC MARKET FOR BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	121
<i>FIGURE 31 ASIA-PACIFIC MARKET FOR BABY FOODS, 2009-2016 (\$ MILLIONS)</i>	122
INFANT FORMULA.....	122
MARKET OVERVIEW	123
MARKET REVENUE.....	124
<i>TABLE 45 ASIA-PACIFIC MARKET FOR INFANT FORMULA, THROUGH 2016 (\$ MILLIONS)</i>	124
<i>FIGURE 32 ASIA-PACIFIC MARKET FOR INFANT FORMULA, THROUGH 2016 (\$ MILLIONS)</i>	125
BABY MEALS	126
BABY CEREAL	126
Market Overview	126
Market Revenue	127
<i>TABLE 46 ASIA-PACIFIC MARKET FOR BABY CEREAL, THROUGH 2016 (\$ MILLIONS)</i>	127

<i>FIGURE 33 ASIA-PACIFIC MARKET FOR BABY CEREAL, 2009-2016 (\$ MILLIONS)</i>	128
BABY SNACKS	128
Market Overview	128
Market Revenue	129
<i>TABLE 47 ASIA-PACIFIC MARKET FOR BABY SNACKS, THROUGH 2016 (\$ MILLIONS)</i>	129
<i>FIGURE 34 ASIA-PACIFIC MARKET FOR BABY SNACKS, 2009-2016 (\$ MILLIONS)</i>	130
BABY DRINKS.....	130
Market Overview	130
Market Revenue	131
<i>TABLE 48 ASIA-PACIFIC MARKET FOR BABY DRINKS, THROUGH 2016 (\$ MILLIONS)</i>	131
<i>FIGURE 35 ASIA-PACIFIC MARKET FOR BABY DRINKS, 2009-2016 (\$ MILLIONS)</i>	132
OTHER BABY FOODS	132
Market Overview	133
Market Revenue	133
<i>TABLE 49 ASIA-PACIFIC MARKET FOR OTHER BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	133
<i>FIGURE 36 ASIA-PACIFIC MARKET FOR OTHER BABY FOODS, 2009-2016 (\$ MILLIONS)</i>	134
MARKET SHARES OF INDUSTRY LEADERS IN THE ASIA-PACIFIC MARKET	134
INFANT FORMULA	134
<i>TABLE 50 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF INFANT FORMULA, 2010 (%)</i>	135
<i>FIGURE 37 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF INFANT FORMULA, 2010 (%)</i>	135
BABY MEALS	136
Baby Cereals.....	136
<i>TABLE 51 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY CEREALS, 2010 (%)</i>	136
<i>FIGURE 38 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY CEREALS, 2010 (%)</i>	137
Baby Snacks.....	137
<i>TABLE 52 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY SNACKS, 2010 (%)</i>	138
<i>FIGURE 39 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY SNACKS, 2010 (%)</i>	138
Baby Drinks	139
<i>TABLE 53 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	139

<i>FIGURE 40 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	140
Other Baby Foods	140
<i>TABLE 54 SHARES OF THE ASIA-PACIFIC MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	141
<i>FIGURE 41 SHARES OF THE ASIAN-PACIFIC MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	141
CHAPTER ELEVEN: MARKET ANALYSIS IN EMERGING/REST-OF-	
THE-WORLD (ROW) MARKETS	142
EMERGING/ROW MARKET REVENUE	142
<i>TABLE 55 EMERGING/ROW MARKETS FOR BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	142
<i>FIGURE 42 EMERGING/ROW MARKETS FOR BABY FOODS, 2009- 2016 (\$ MILLIONS)</i>	143
INFANT FORMULA	143
MARKET OVERVIEW	144
MARKET REVENUE	144
<i>TABLE 56 EMERGING/ROW MARKETS FOR INFANT FORMULA, THROUGH 2016 (\$ MILLIONS)</i>	145
<i>FIGURE 43 EMERGING/ROW MARKETS FOR INFANT FORMULA, 2009-2016 (\$ MILLIONS)</i>	145
BABY MEALS	145
BABY CEREAL	146
Market Overview	146
Market Revenue	147
<i>TABLE 57 EMERGING/ROW MARKETS FOR BABY CEREALS, THROUGH 2016 (\$ MILLIONS)</i>	147
<i>FIGURE 44 EMERGING/ROW MARKETS FOR BABY CEREAL, 2009- 2016 (\$ MILLIONS)</i>	148
BABY SNACKS	148
Market Overview	148
Market Revenue	149
<i>TABLE 58 EMERGING/ROW MARKETS FOR BABY SNACKS, THROUGH 2016 (\$ MILLIONS)</i>	149
<i>FIGURE 45 EMERGING/ROW MARKETS FOR BABY SNACKS, 2009- 2016 (\$ MILLIONS)</i>	150
BABY DRINKS	150
Market Overview	150
Market Revenue	151
<i>TABLE 59 EMERGING/ROW MARKETS FOR BABY DRINKS, THROUGH 2016 (\$ MILLIONS)</i>	151

<i>FIGURE 46 EMERGING/ROW MARKETS FOR BABY DRINKS, 2009-2016 (\$ MILLIONS)</i>	152
OTHER BABY FOODS	152
Market Overview	152
Market Revenue	153
<i>TABLE 60 EMERGING/ROW MARKET FOR OTHER BABY FOODS, THROUGH 2016 (\$ MILLIONS)</i>	153
<i>FIGURE 47 EMERGING/ROW MARKETS FOR OTHER BABY FOODS, 2009-2016 (\$ MILLIONS)</i>	154
MARKET SHARES OF INDUSTRY LEADERS IN THE REST OF THE WORLD MARKET.....	154
INFANT FORMULA.....	154
<i>TABLE 61 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS OF INFANT FORMULA, 2010 (%)</i>	155
<i>FIGURE 48 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS OF INFANT FORMULA, 2010 (%)</i>	155
BABY MEALS	156
Baby Cereals.....	156
<i>TABLE 62 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS OF BABY CEREAL, 2010 (%)</i>	156
<i>FIGURE 49 SHARES OF EMERGING/ROW MANUFACTURERS/SUPPLIERS OF BABY CEREALS, 2010 (%)</i>	156
Baby Snacks.....	157
<i>TABLE 63 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS BABY SNACKS, 2010 (%)</i>	157
<i>FIGURE 50 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS OF BABY SNACKS, 2010 (%)</i>	158
Baby Drinks	158
<i>TABLE 64 SHARES OF THE EMERGING/ROW MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	159
<i>FIGURE 51 SHARES OF EMERGING/ROW MANUFACTURERS/SUPPLIERS OF BABY DRINKS, 2010 (%)</i>	159
Other Baby Foods	160
<i>TABLE 65 SHARES OF EMERGING/ROW MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	160
<i>FIGURE 52 SHARES OF EMERGING/ROW MANUFACTURERS/SUPPLIERS OF OTHER BABY FOODS, 2010 (%)</i>	160
CHAPTER TWELVE: PATENT ANALYSIS	161
PATENTS BY YEAR.....	161
<i>TABLE 66 NUMBER OF SIGNIFICANT PATENTS BY YEAR, 2007-2011 (NO/%)</i>	162
<i>FIGURE 53 NUMBER OF PATENTS BY YEAR, 2007-2011</i>	162

<i>FIGURE 54 NUMBER OF PATENTS BY YEAR, 2007–2011 (%)</i>	163
PATENTS BY TYPE.....	163
<i>TABLE 67 PATENTS BY TYPE FOR BABY FOODS, 2007–2011 (NO. OF PATENTS)</i>	163
<i>FIGURE 55 PATENTS BY TYPE FOR BABY FOODS, 2007–2011 (NO. OF PATENTS)</i>	164
PATENTS BY COMPANY.....	164
INFANT FORMULA.....	164
<i>TABLE 68 NUMBER OF U.S. PATENTS BY COMPANY FOR INFANT FORMULA, 2007–2011</i>	165
<i>FIGURE 56 PATENTS BY COMPANY FOR INFANT FORMULA, 2007–2011 (NO. OF PATENTS)</i>	165
BABY MEALS.....	166
<i>TABLE 69 NUMBER OF U.S. PATENTS BY COMPANY FOR BABY MEALS, 2007–2011</i>	166
<i>FIGURE 57 NUMBER OF U.S. PATENTS BY COMPANY FOR BABY MEALS, 2007–2011</i>	166
PATENTS BY COUNTRY.....	167
INFANT FORMULA.....	167
<i>TABLE 70 NUMBER OF U.S. PATENTS BY COUNTRY FOR INFANT FORMULA, 2007–2011</i>	167
<i>FIGURE 58 NUMBER OF U.S. PATENTS BY COUNTRY FOR INFANT FORMULA, 2007–2011</i>	168
BABY MEALS.....	168
<i>TABLE 71 NUMBER OF U.S. PATENTS BY COUNTRY FOR BABY MEALS, 2007–2011</i>	168
<i>FIGURE 59 NUMBER OF U.S. PATENTS BY COUNTRY FOR BABY MEALS, 2007–2011</i>	169
<i>TABLE 72 PATENT SHARES BY COUNTRY FOR BABY FOODS, 2007–2011 (SEPTEMBER) (%)</i>	169
<i>FIGURE 60 PATENT SHARES BY COUNTRY FOR BABY FOODS, 2007–2011 (SEPTEMBER) (%)</i>	170
PATENTS BY ASSIGNEE.....	170
<i>TABLE 73 PATENTS BY ASSIGNEE TYPE FOR BABY FOODS, 2007–2011 (NO. OF PATENTS)</i>	170
<i>FIGURE 61 PATENTS BY ASSIGNEE TYPE FOR BABY FOODS, 2007–2011 (NO. OF PATENTS)</i>	171

CHAPTER THIRTEEN: CURRENT SITUATION AND MARKET

PROSPECTS.....	172
CURRENT SITUATION AND.....	172
FACTORS AFFECTING THE MARKET.....	173
THE INCREASE IN THE NUMBER OF WORKING WOMEN.....	173
NEW AGE FORMULAS MIMIC BREAST MILK.....	173
GROWING ORGANIC BABY FOOD SECTOR.....	173

AVAILABILITY AND VARIETY OF CONVENIENT BABY FOODS	173
FUTURE PROSPECTS OF THE MARKET	174
CHAPTER FOURTEEN: COMPANY PROFILES	175
ABBOTT NUTRITION	175
AUSNUTRIA DAIRY (HUNAN) COMPANY LTD.....	175
AVANTE INTERNATIONAL.....	176
BABYLICIOUS LTD.....	176
BABYNAT ORGANIC.....	177
BEECH-NUT NUTRITION CORPORATION	177
DANONE.....	178
DUMEX	179
DUTCH LADY MILK INDUSTRIES BERHAD.....	179
EARTH'S BEST ORGANIC BABY FOOD	180
ELLA'S KITCHEN.....	181
FASSKA S.A.....	181
GERBER PRODUCTS COMPANY	182
GOLDENCROPS CORPORATION.....	182
GUANGDONG YASHILI GROUP CO., LTD.	183
HAPPYBABY	183
HERO GROUP	184
HIPPI ORGANIC BABY FOOD.....	185
H.J. HEINZ COMPANY OF CANADA LP (CANADA)	185
HOLLE BABY FOOD GMBH.....	186
JIANGXI MEILU DAIRY CO., LTD.	186
LITTLE DUCK ORGANICS.....	187
LO BELLO FOSFOVIT SRL	187
LYPACK	188
MEAD JOHNSON & COMPANY	188
MEDIFOOD	189
MORINAGA MILK INDUSTRY CO., LTD.....	189
NESTLE GLOBAL.....	190
NUTRICIA.....	190
NUTRIPHARM NEW ZEALAND LTD.....	191
ORGANIX BRANDS LTD.....	191
ORGANIC BUBS	192
PBM PRODUCTS, LLC	192
PETER RABBIT ORGANICS LTD	193
PFIZER INC.....	193
PLUM BABY	194
SHANDONG YINGERLE HWA TAI FOOD INDUSTRY CO., LTD.....	195
SMA NUTRITION	195
SPROUT FOODS, INC.	196
SWEET PEA BABY FOOD.....	196

UNITED DAIRY LTD.....	197
VICTORIAN DAIRY PTY. LTD.	197
YUBAO GOAT DAIRY CO., LTD.....	198
APPENDIX I: ABBREVIATIONS.....	199
ABBREVIATIONS	199