

Navigating diaper price sensitivity in the “baby bust” economy



The US, the world’s largest diaper market, is a key indicator of global trends and recent data reveals a significant market realignment. Between May 2023 and April 2025, the number of diaper SKUs in the market fell by 14%, reflecting a broader trend towards SKU rationalisation and leaner portfolios. Within this shrinking assortment, the pricing tiers have shifted meaningfully. The share of SKUs priced under USD40 has steadily increased, while the share of SKUs priced over USD40 has dropped from 32% to 26%.

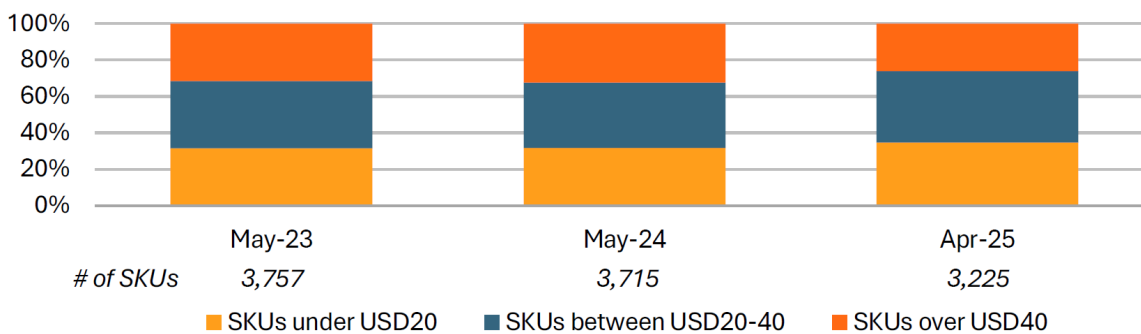
This shift is driven by continued price sensitivity among consumers, but even the most budget-

conscious shoppers are unwilling to compromise on quality.

As a result, manufacturers and retailers are making more deliberate choices about which features to emphasise at each price point. Claims that once signalled premium quality, such as “hypoallergenic”, “no parabens” and “natural”, are now common across all tiers. Meanwhile, the remaining premium SKUs are being positioned more assertively, with a focus on targeted benefits like “sensitive” and “skin health”. This strategy aims to justify higher prices by highlighting specific health and comfort advantages.

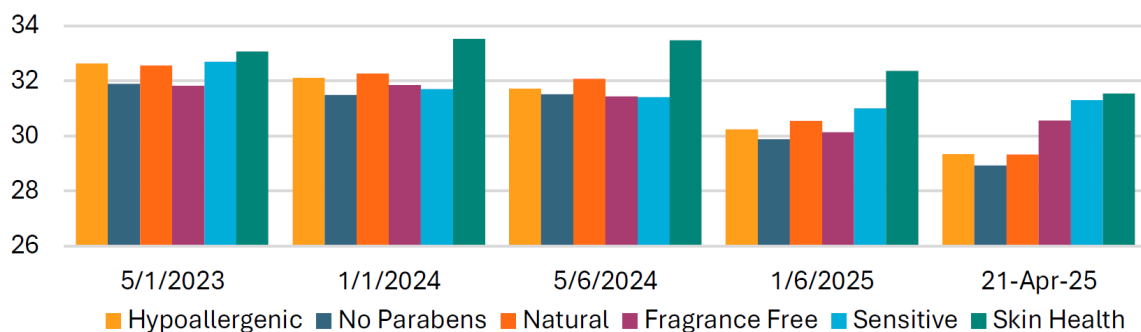
US: SKUs by pricing tiers for online diapers, May 2023-April 2025

% of SKUs



US: Average SKU price by claim for online diapers, June 2023-April 2025

USD/SKU



Source: Euromonitor International e-commerce SKU tracker Via