



Global Market for Baby Care Today & Tomorrow



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Cotton Sustainability

Biodegradability of Cotton

Topics > Sustainability > Cotton Sustainability

Just as grocery store shoppers seek ingredient lists they know and understand, the textile manufacturers to clothing retailers and brands – is seeking answers on where its raw material impacts the environment. The U.S. cotton industry wants to ensure the cotton fiber is so it can trust and continue to depend on when making product decisions to use cotton.

This page contains three past webinars:
Breaking it Down: Cotton's Biodegradability in Various Environments
(Replay from March 27, 2018)
Breaking it Down: Cotton's Biodegradability in Aquatic Environments
(Replay from April 24, 2018)
Turning the Tides: Tackling Our Ocean's Plastic Pollution Problem
(Replay from March 20, 2018)



Recycled Cotton

The use of recycled materials is a growing topic of discussion in the cotton industry.

Sourcing Directories

Fiber Sourcing

Global suppliers of cotton fiber including virgin fiber, scoured and bleached, recycled, and more.

[View Directory](#)

Nonwovens Sourcing

Global suppliers of cotton nonwovens manufactured by various technologies.

[View Directory](#)

Technical Education

Needlepunching: Beyond the Basics

This lecture builds off *Needlepunching Basics*. Dive deeper into the major components of the bonding process for nonwoven materials and learn about additional needle features.



INTRODUCTION TO NONWOVENS PROCESS & PRODUCTS
NEEDLEPUNCHING: BEYOND THE BASICS
(LECTURE #12)



News

Monthly Economic Letter: August 2019

POSTED ON AUGUST 14, 2019



Cotton Market Fundamentals & Price Outlook

Recent Price Movements

All benchmark prices decreased over the past month.

Executive Cotton Update: August 2019

POSTED ON AUGUST 6, 2019



U.S. Macroeconomic Indicators & the Cotton Supply Chain

Macroeconomic Overview

According to the advance (preliminary) estimate released by the Bureau of Economic Analysis, the U.S. grew at a 2.1% annualized rate in the second quarter. In the first quarter, the U.S. economy grew 3.1%. The slowdown in the second quarter was primarily a result of a sharp reversal in business inventories, which went from a 6.2% rate of growth in the first quarter to a 5.5% reduction in the second quarter. Consumer spending strengthened in the second quarter, rising from 1.1% to 4.3% quarter-over-quarter. A strong labor market that has pushed unemployment to multi-decade lows and which has started to lift wages has supported spending growth.

The International Monetary Fund (IMF) lowered its forecasts for global GDP last month (from the 3.3% projected in April to 3.2% for 2019, from the 3.5% projected in April to 3.4% for 2020). In the accompanying report, the IMF indicated that risks remain to the downside. The list of specific risks featured the impact of trade tensions. A central concern was the U.S.-China dispute, but also included Brexit.

Recent talks between the U.S. and China did not result in significant progress. In response, the U.S. initiated



Type your questions in the Q&A window at any time during the webinar.



Find the presentation slides and other resources at **cottonworks.com** at the conclusion of the webinar.



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Webinar Support



Global Market for Baby Care Today & Tomorrow

Who is Cotton Incorporated?



Global not-for-profit research
Neither manufacture nor sell



Cotton from seeds to sustainability
Report to the USDA



400-500 Research projects per year



INDUSTRY OUTLOOK

PATHS TO PURCHASE

CONSUMER USE AND NEEDS

COTTON POSSIBILITIES



INDUSTRY OUTLOOK



Consumer Research Overview



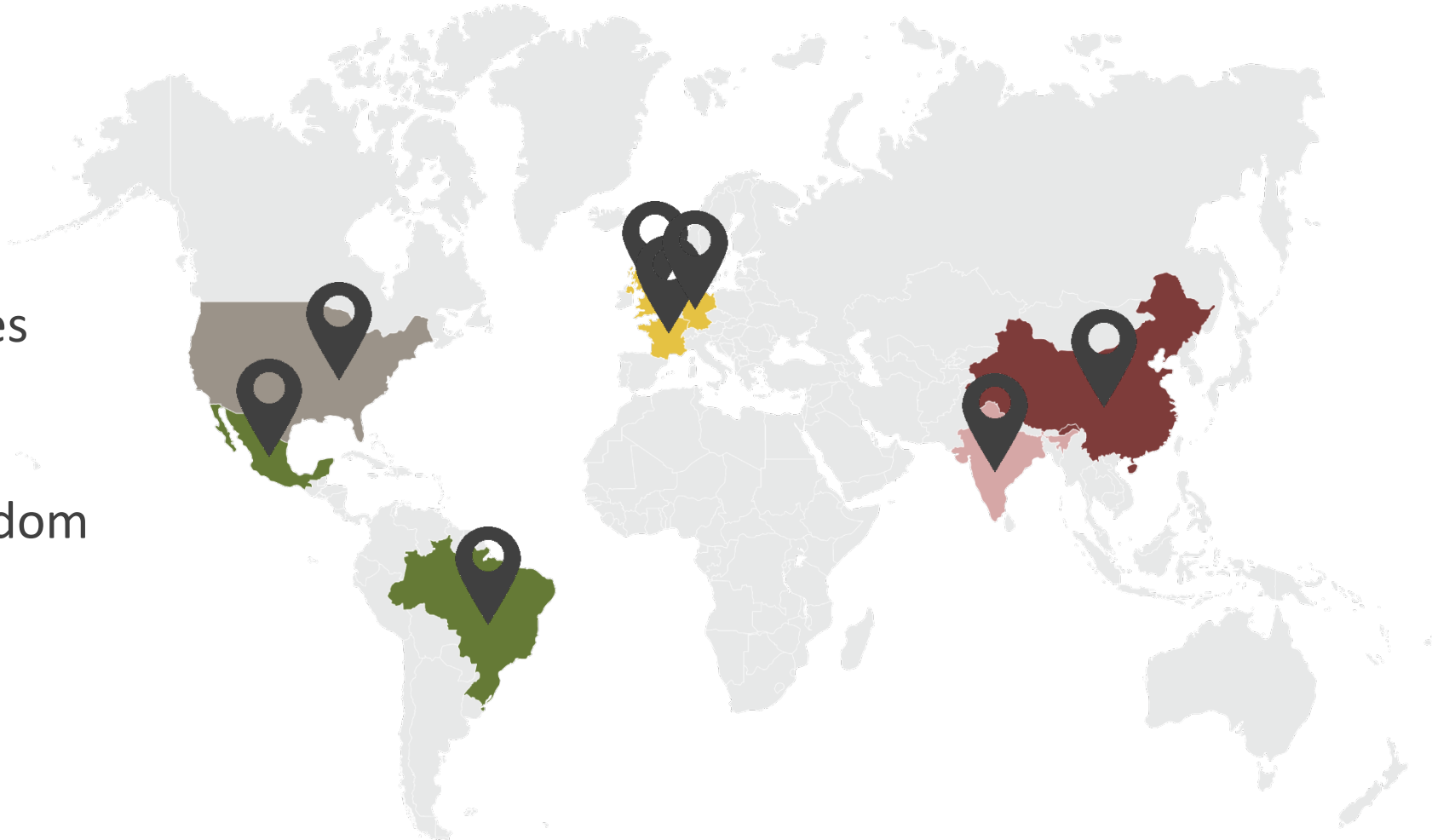
Global Diapers & Wipes Market



Market Forecast

Consumer Research Methodology

United States
Mexico
Brazil
United Kingdom
France
Germany
India
China

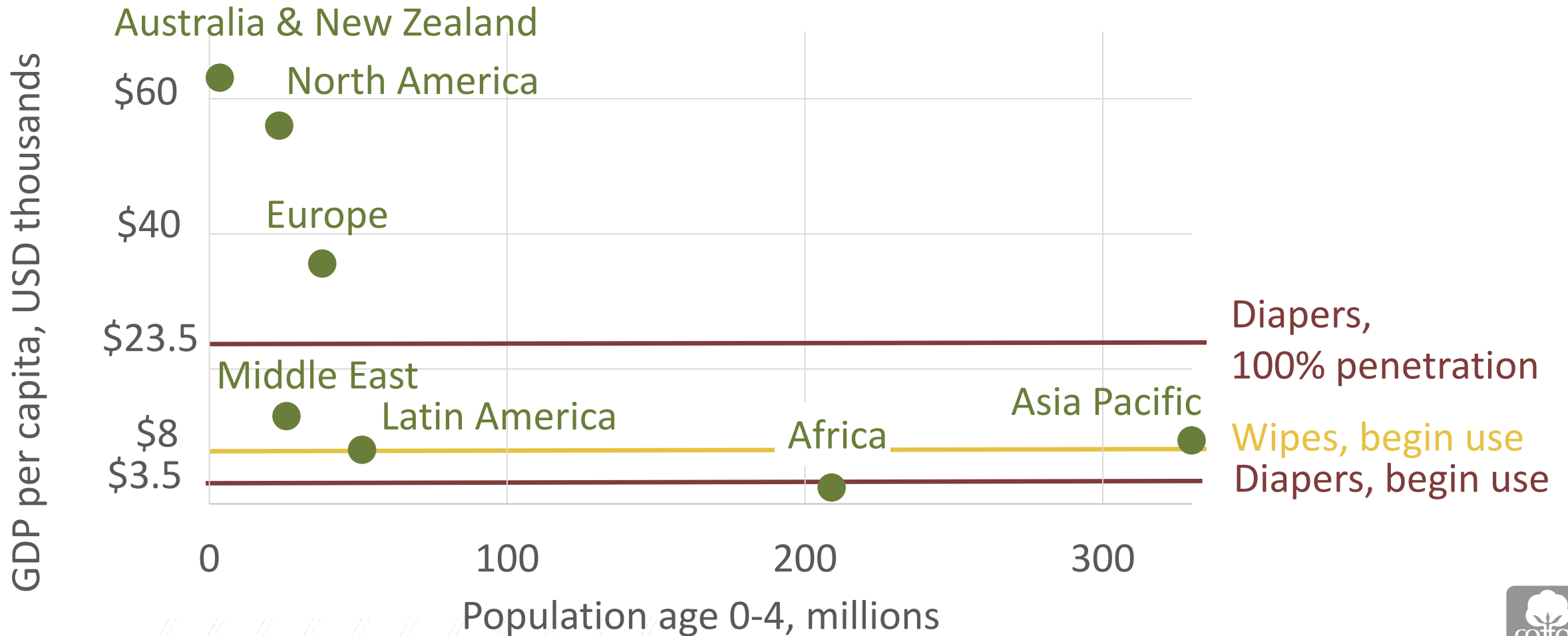


Source: Cotton Incorporated 2018 Baby Care Study



Population & Purchasing Power

Projected Diapers & Wipes Market, 2023



Source: UN Population Division, International Monetary Fund



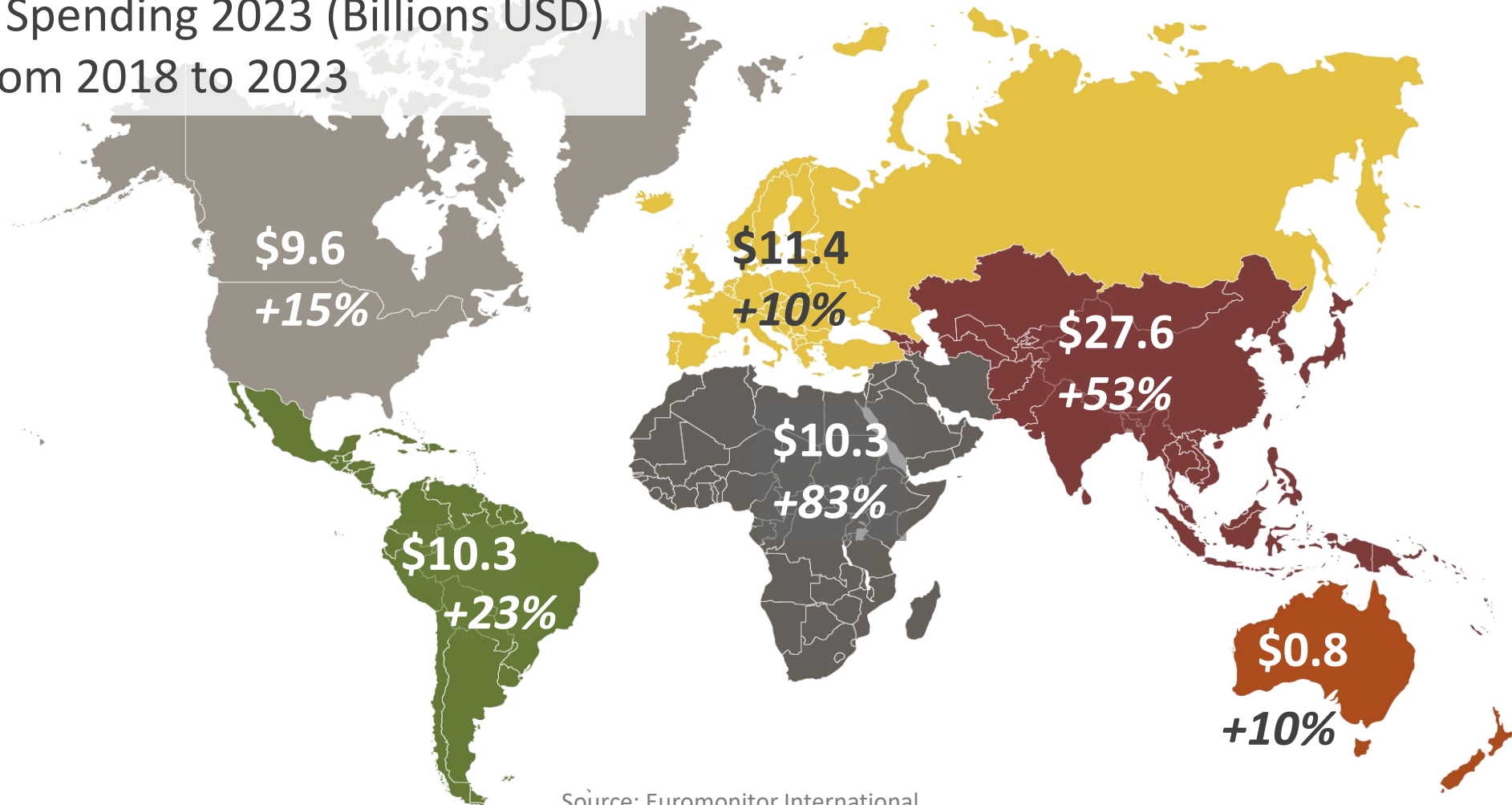
Global Diapers & Wipes Market

Strongest growth projected in Asia and Africa

\$70.1

+36%

Projected Spending 2023 (Billions USD)
Growth from 2018 to 2023



Source: Euromonitor International

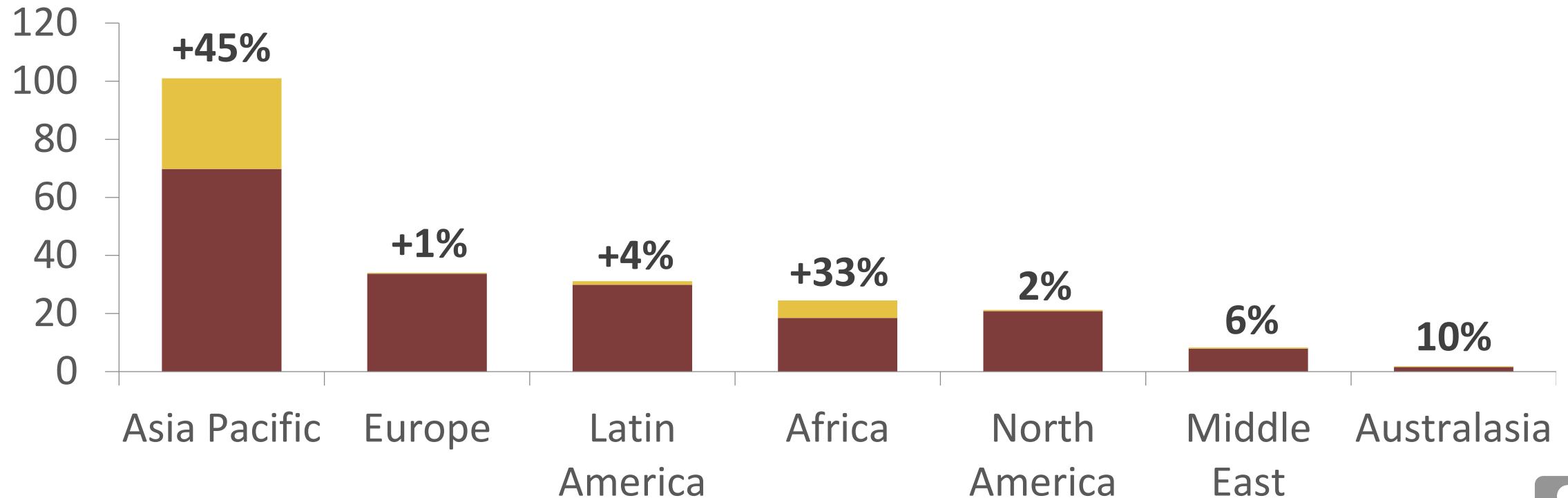


Diaper Unit Sales

Diaper sales grow in the developing world

■ Projected Growth to 2023
■ Diaper Unit Volume 2018

Billions



Source: Euromonitor International

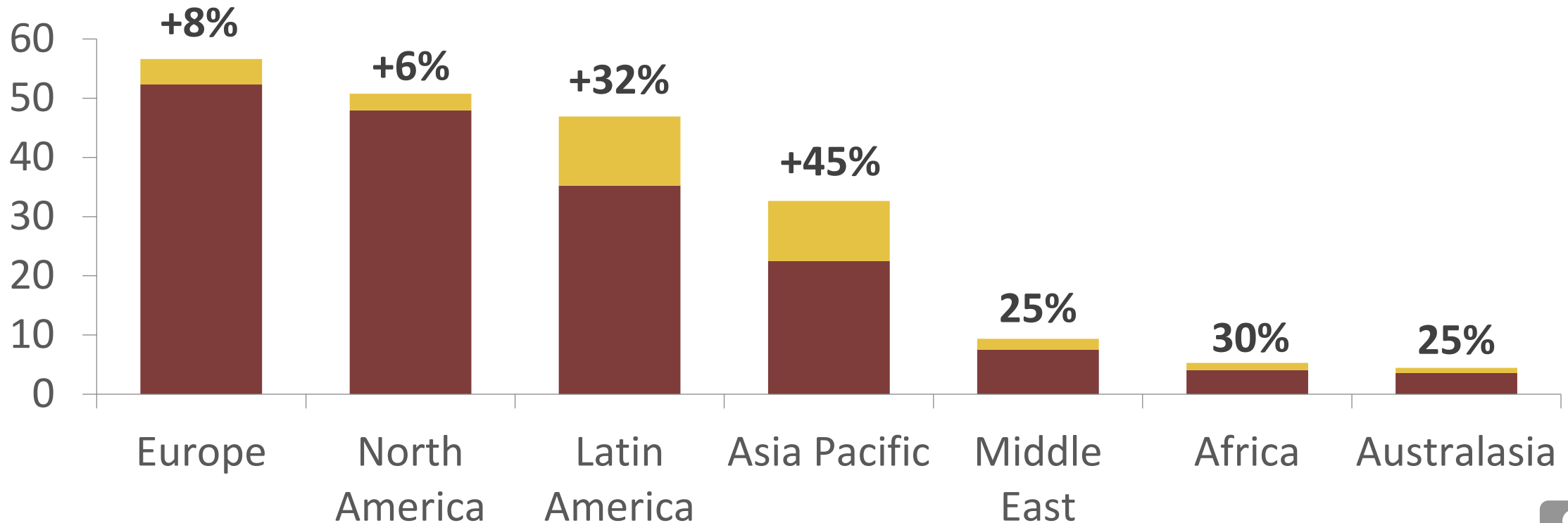


Baby Wipes Unit Sales

Wipes sales grow across regions (units in single wipes)

■ Projected Growth to 2023
■ Wipes Unit Volume 2018

Billions



Source: Euromonitor International



INDUSTRY OUTLOOK



Global growth buying power



Strong growth opportunities
throughout Asia



Don't lose sight of developed market
volume

INDUSTRY OUTLOOK

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PATHS TO PURCHASE



Sources of Diapers' and Wipes' Information



Social Media and Parenting Groups



Regional Shopping Channel Differences

Sources of Information

Word of mouth is most popular worldwide



People



New Media



Retail



Advertising



Parenting
Groups

WORLD

75%

66%

62%

61%

60%

HIGHEST

82%

Latin America/ China

85%

India

71%

U.S.

83%

India

75%

India

LOWEST

69%

U.S./ Europe

54%

U.S.

58%

India

44%

U.S.

46%

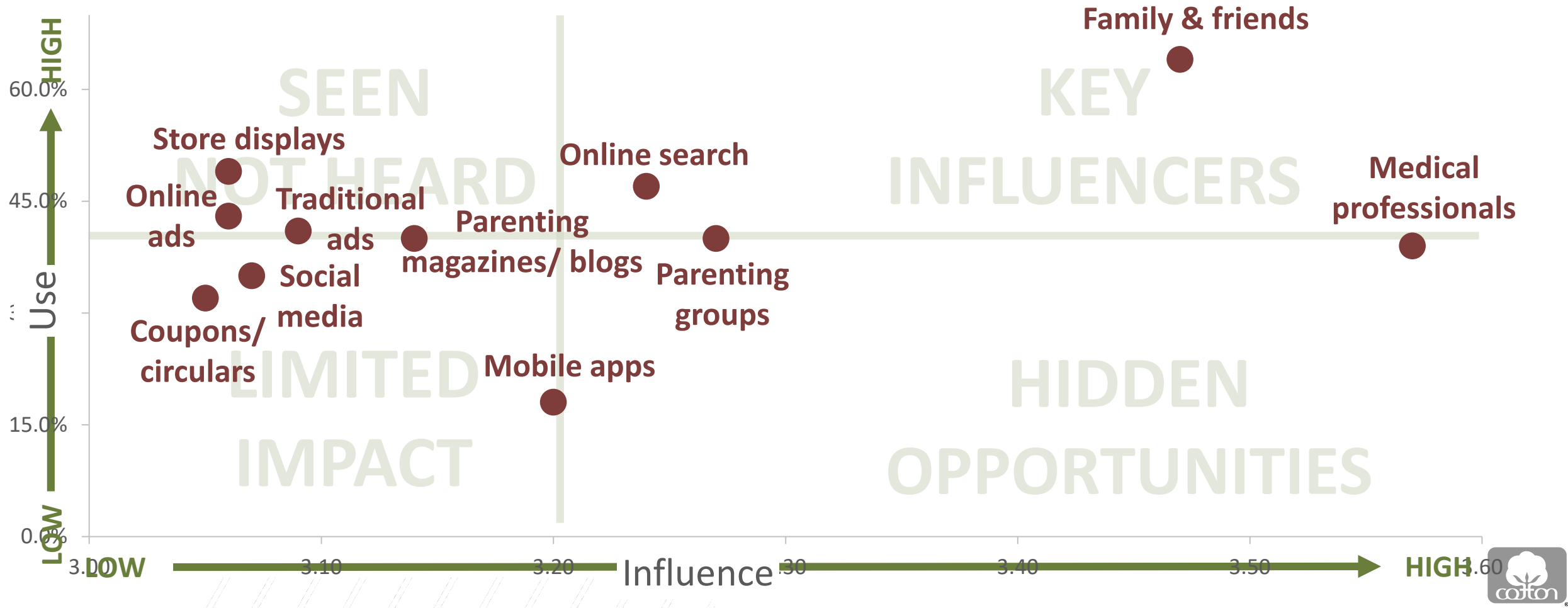
U.S.



Source: Cotton Incorporated 2018 Baby Care Study

Impact of Information Sources

Family and friends stand out as widely used and influential

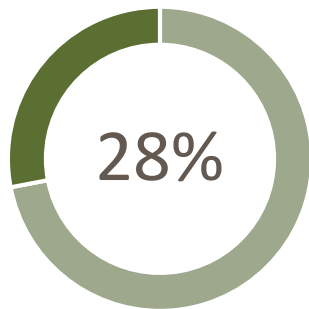


Where Consumers Buy Diapers & Wipes

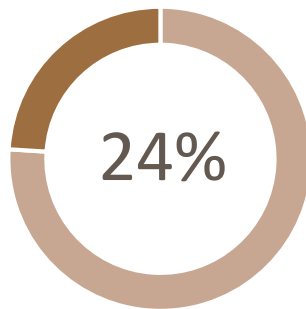
Grocery stores are a top destination for baby care products



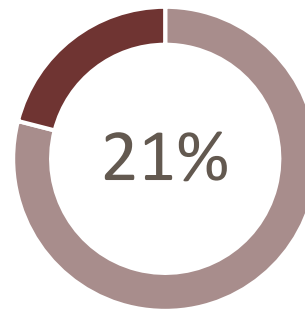
Supermarket



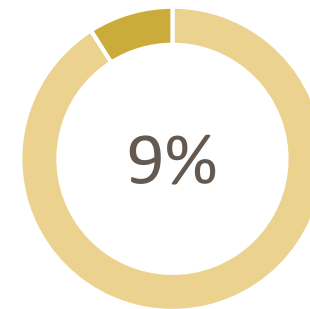
Mass Merchandiser



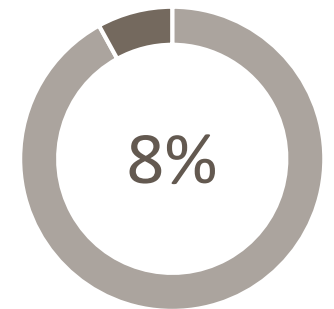
Specialty Retailer



Convenience/Corner Store



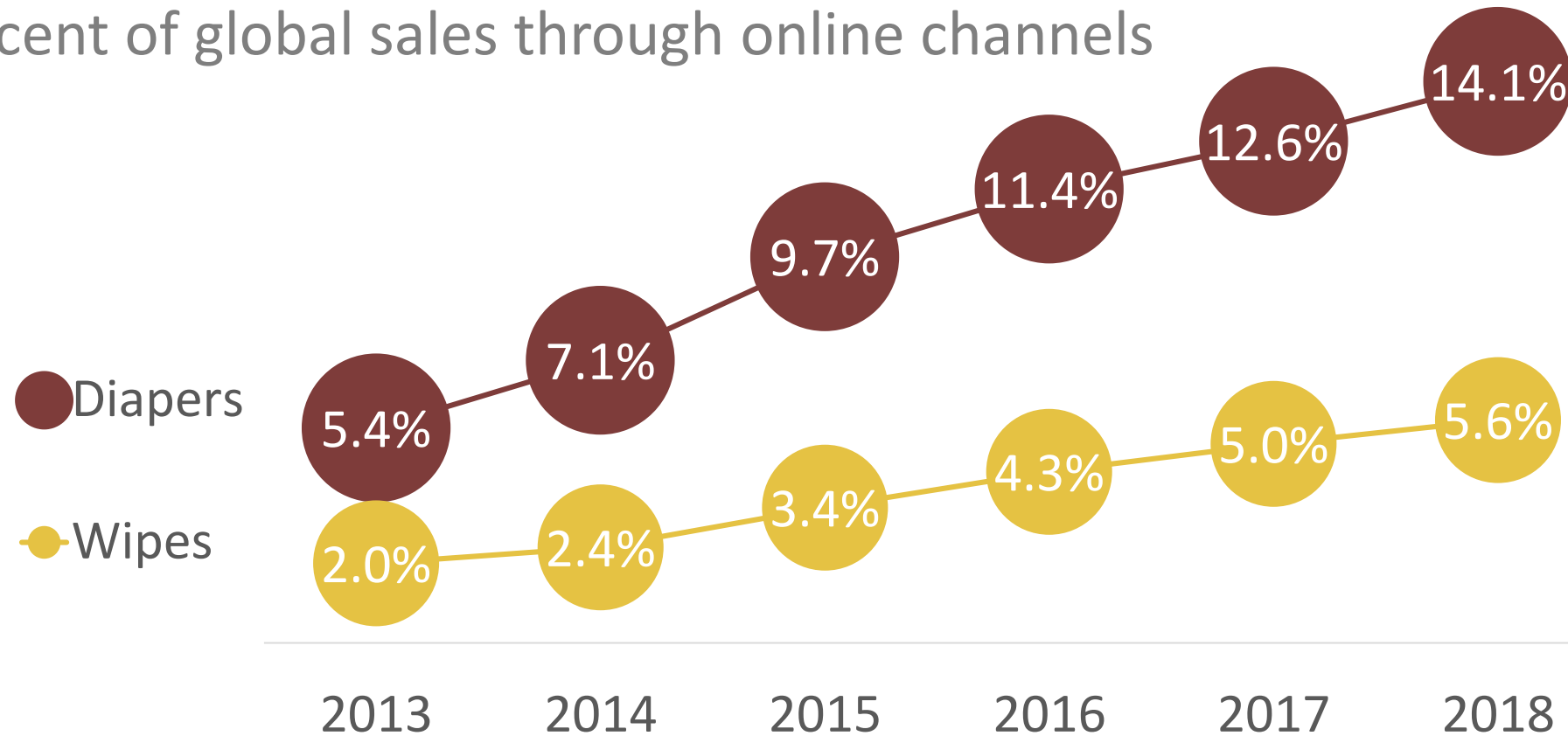
Internet



Growth in Internet Retailing

Consumers increasingly purchase diapers and wipes online

Percent of global sales through online channels



Source: Euromonitor International



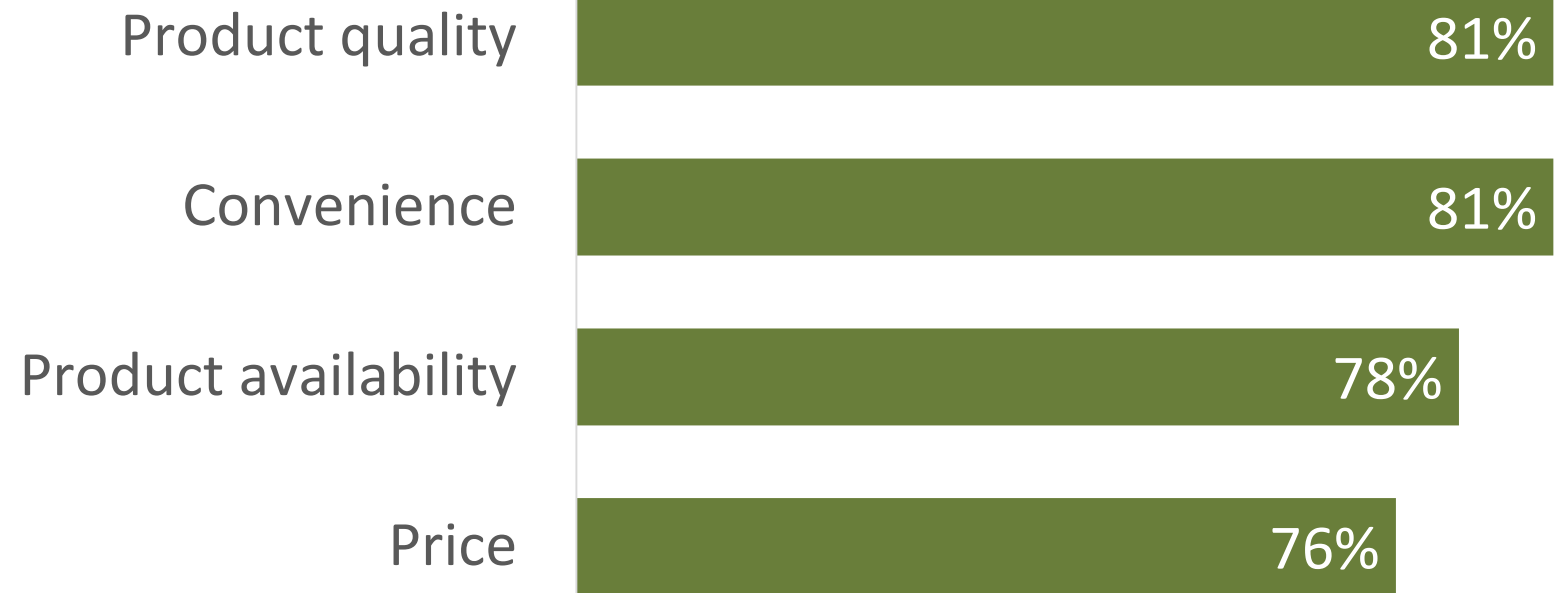
Subscription Services

Subscriptions offer quality and convenience

36%
Use subscription
service



Pro



PATHS TO PURCHASE



Person-to-person impact



Parenting groups and
product recommendations



Regional differences in channels

INDUSTRY OUTLOOK

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CONSUMERS USE AND NEEDS

COTTON POSSIBILITIES



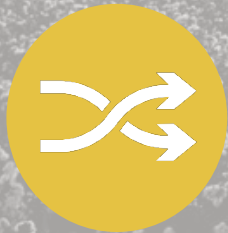
CONSUMER USE AND NEEDS



Leading Brands



Purchase Drivers



Switching Brands

Popular Diapers Brands

Global brands compete with regional brands for market share

U.S.



U.K.



Germany



France



India



China



Brazil



Mexico



Popular Wipes Brands

Similar trends in baby wipes

U.S.



U.K.



Germany



France



India



China



Brazil



Mexico



Diapers Purchase Drivers

Performance and comfort top the list



Primary

protects against leaks |
absorbency | comfort |
stays dry next to skin



Secondary

fit | hypoallergenic |
softness | easy to use |
can handle multiple
wettings



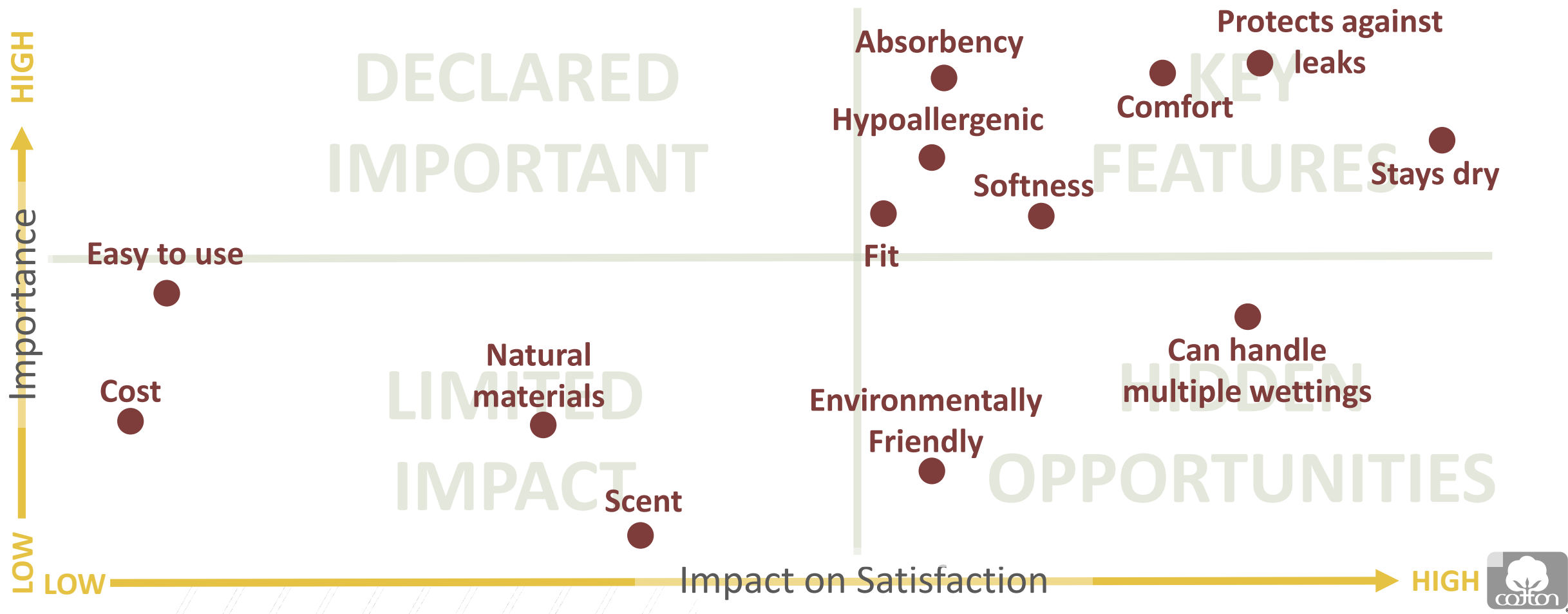
Other

cost | made of
natural materials |
environmentally
friendly



Diaper Feature Impact

Hidden opportunities exist in sustainability and performance



Source: Cotton Incorporated 2018 Baby Care Study

Switching Diaper Brands

Cost and functionality are leading reasons to switch diaper brands



26% Leaks/
Blowouts



25% Absorbency



25% Cost



24% Cannot handle
multiple wettings



23% Fit



20% Comfort



Wipes Primary Purchase Drivers

Differences in priorities across countries

Stays wet in package

Hypoallergenic

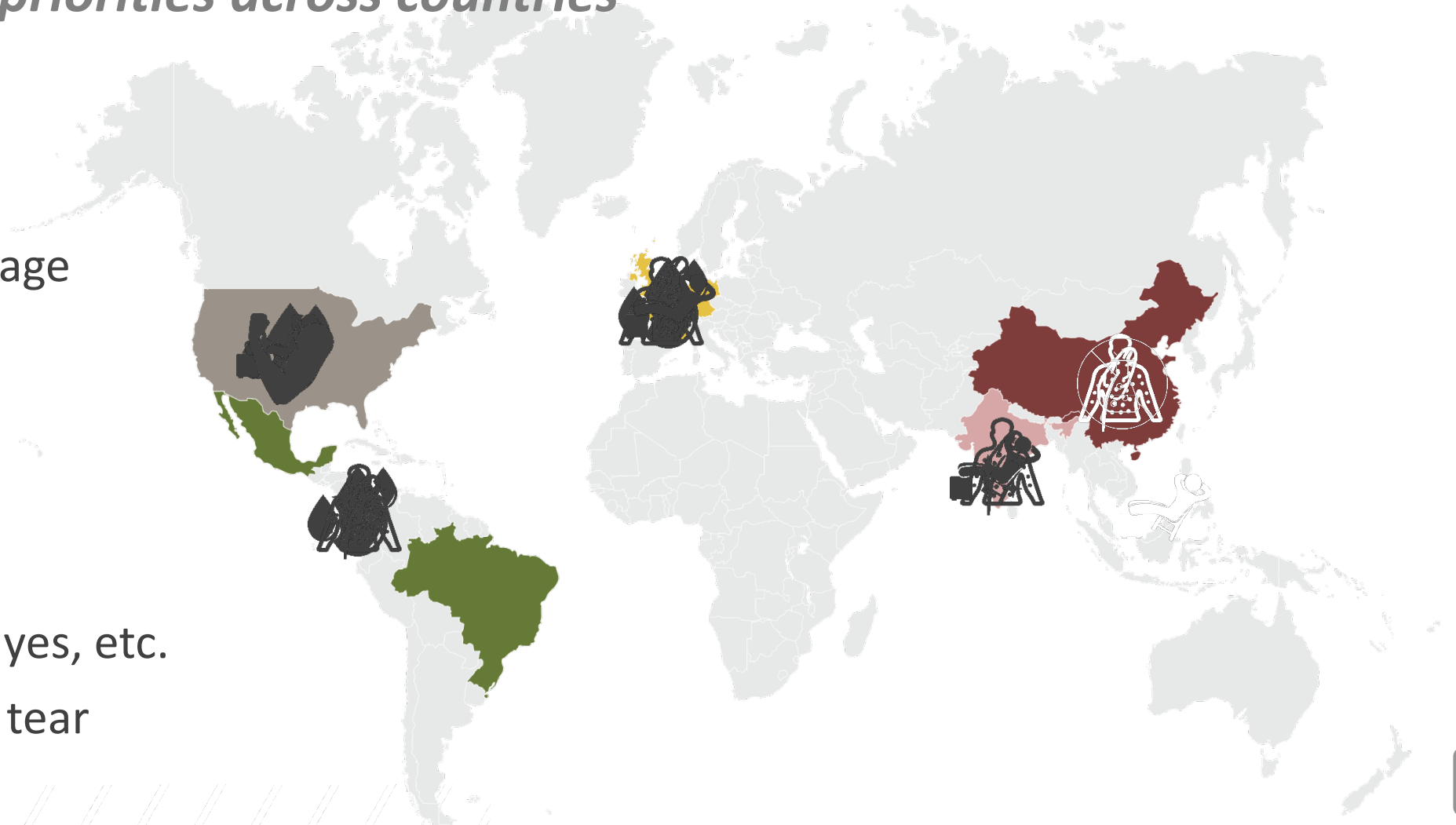
Softness

Comfort

Cleans well

Free of alcohol, dyes, etc.

Strong/ does not tear



Wipes Feature Impact

Hidden opportunities exist in packaging features



Source: Cotton Incorporated 2018 Baby Care Study



Switching Wipes Brands

Packaging features influence brand-switch



35% Does not pull out
one at a time



33% Liquid
distribution



33% Does not
stay wet



29% Weak/ Tears



29% Cost



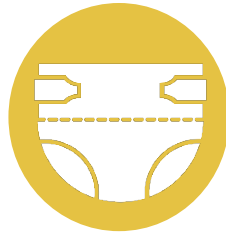
33% Difficult to
open/close



CONSUMER USE AND NEEDS



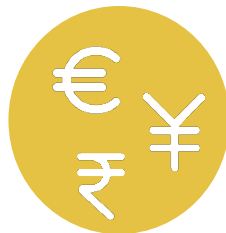
Top brands are a mix of global and regional



Primary drivers include leak protection, absorbency, comfort, and dryness



Regional differences in important product features



Products must remain affordable

INDUSTRY OUTLOOK

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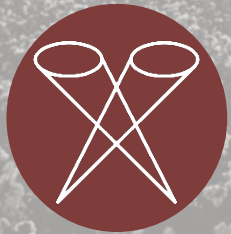
COTTON POSSIBILITIES



Mindset of Today's Parents



Cotton Trust and Familiarity



Sustainability Spotlight

PARENTAL MINDSET

Parents are anxious to do right by their children



Wealth of information and advice



Awareness of environmental and health impacts



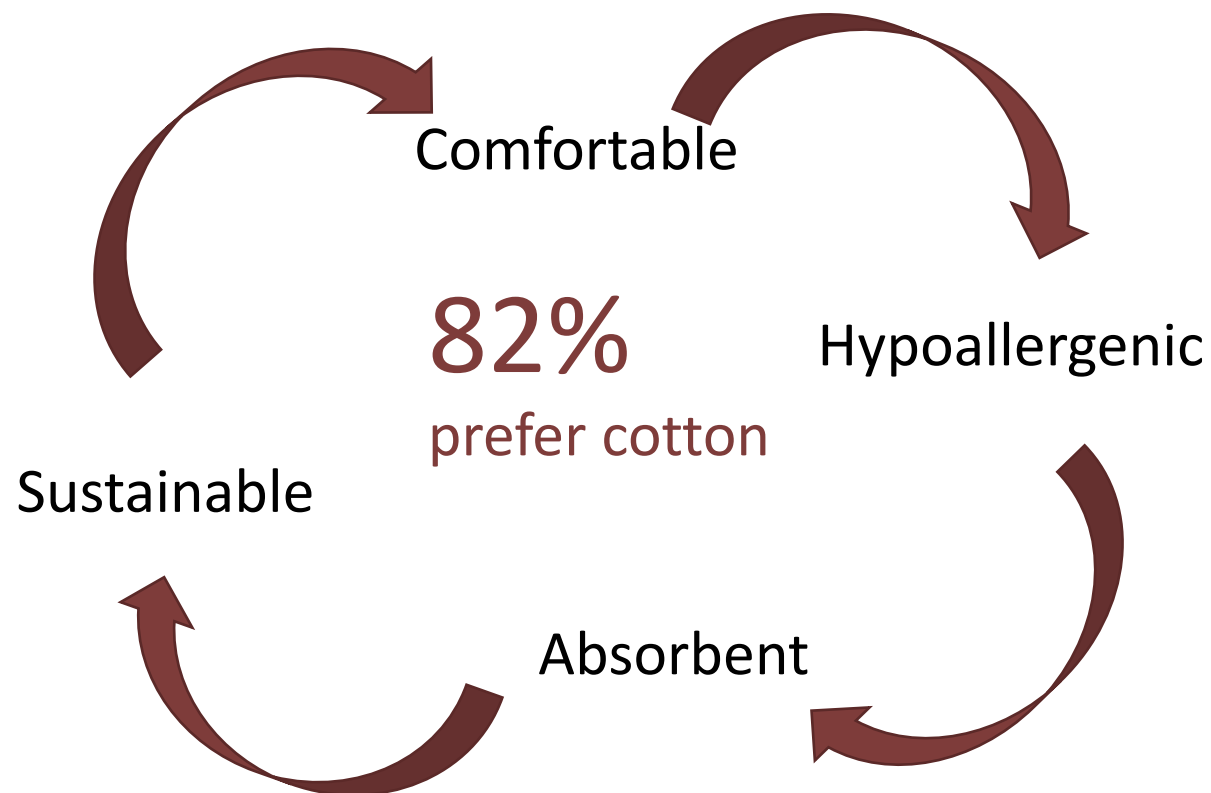
Increasing buying power in developing countries

Familiar and Trusted

Cotton is a preferred fiber for babies – and for good reason

“[Cotton] represents pure and clean material. It also represents softness. It is a preferred material for me to use on my baby.”

Consumer view of cotton:



Awareness of Cotton Products

3 in 4 consumers expect cotton in baby care products

Percent who expect the following products to be made of cotton



Source: Cotton Incorporated 2018 Baby Care Study



Cotton Delivers

Cotton is associated with valued features

Percent who say cotton delivers best on the following high-importance features:



66% Comfort



65% Softness



60% Absorbency



58% Hypoallergenic



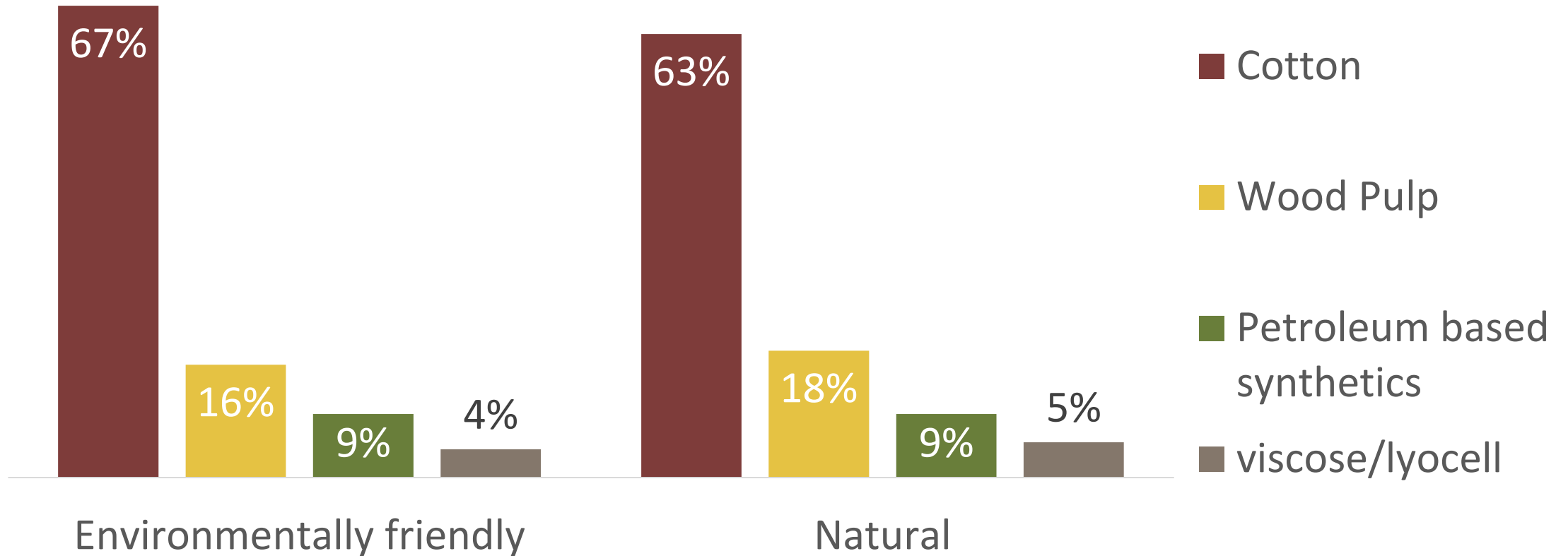
56% Stays dry
next to skin



Fiber and Sustainability

Cotton wins with consumers on sustainability

Percent who say the following fibers deliver best on sustainability :

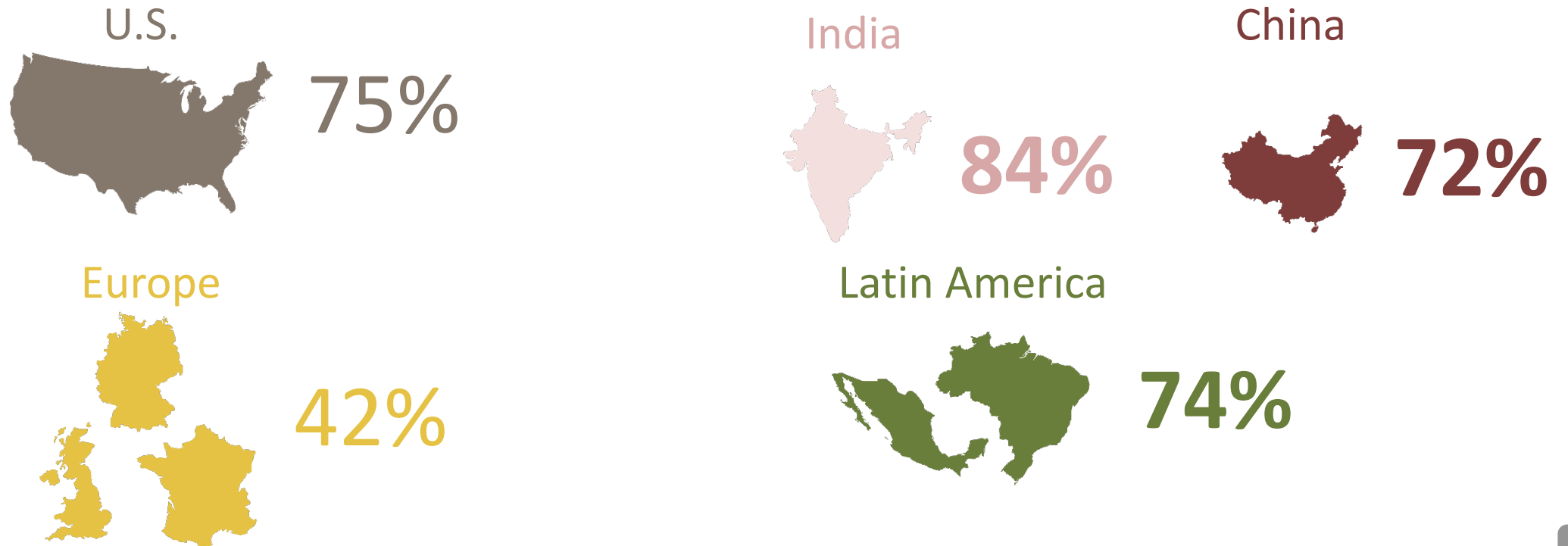


Source: Cotton Incorporated 2018 Baby Care Study

Familiarity with Seal of Cotton

High awareness across Asia, Latin America, and U.S.

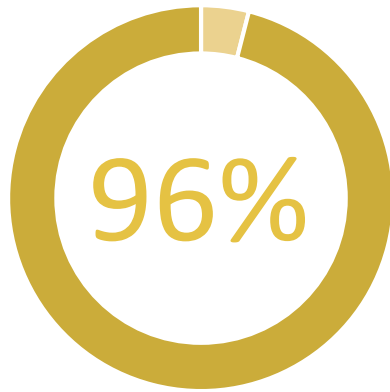
Percent who are familiar with the Seal of Cotton



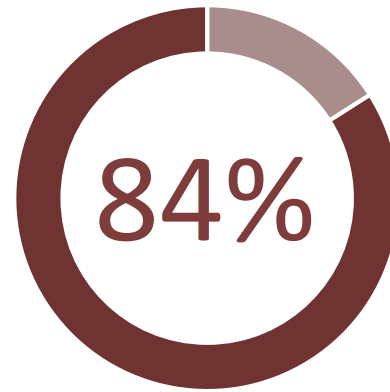
Source: Cotton Incorporated 2018 Baby Care Study

Seal of Cotton Meanings

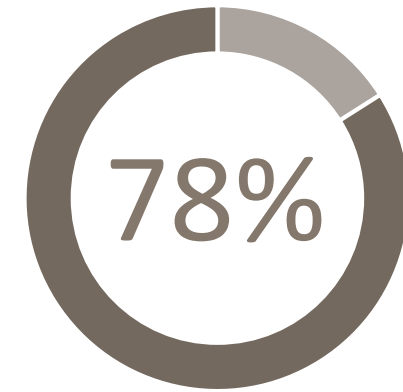
The Seal communicates quality and value



Logo **helps identify**
product as
containing cotton



Baby care products
with this logo are
better quality



Willing to **pay more**
for baby care product
with this logo



COTTON POSSIBILITIES



Wealth of choices leads to angst



Cotton is a trusted and familiar fiber, signaled by Seal of Cotton



Cotton is seen as a sustainable solution to environmental woes



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Webinars

Events > Webinars

PAST WEBINARS:

The Tariff Dispute & the
Cotton Supply Chain

Turning the Tides:
Tackling Our Ocean's
Plastic Pollution
Problem

Breaking it Down:
Cotton's
Biodegradability in
Aquatic Environments

Breaking it Down:
Cotton's
Biodegradability in
Various Environments

Sustainable Denim
Processing

Life Cycle Assessment
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