

# baby care

## MARKET REPORT





## baby wipes and diapers market overview

The baby wipes and diaper market is a big one – reaching \$9,188 million USD in 2023.<sup>1</sup> The category is significantly dominated by nappies, diapers, and pants in comparison to baby wipes, with a share of 76% and 24% respectively in 2023.<sup>1</sup>

Young parents are leading demand for sustainable, skin-safe products, and have also identified skin health as a key parent pain point. These sentiments are actualizing at retail - proven in Cotton Incorporated's Market & Insights Dashboard for nonwovens products

**In 2023, diapers had 76% market share in the baby care category and wipes had 24%.<sup>1</sup>**

- since four of the top five claims overall in baby care (includes wipes, nappies, diapers, and pants) deal with health and skin-centric messaging of the 10,975 web-scraped skus evaluated.<sup>2</sup>

With consumers rationing spending due to inflation, brands need to offer specific value to differentiate. Brand building through creative partnerships, telling purpose-lead sustainability stories, and investing in skin health are all ways baby brands can stand out on shelves and online.

Total U.S. market size in 2023<sup>1</sup>

**\$9,188** MILLION

Top U.S. brand in 2023<sup>1</sup>

**Huggies**

**\$2,809** MILLION

Total U.S. market concentration of the top 5 brands in 2023<sup>1</sup>

**70.6%**

**Huggies, Pampers, Luvs, Goodnites, Honest**



## Global outlook, compound annual growth rates 2023-2028<sup>1</sup>

1.9%

AUSTRALIA / AUSTRALASIA

1.5%

ASIA PACIFIC

0.9%

NORTH AMERICA

0.5%

SOUTH AMERICA / LATIN AMERICA  
/ WESTERN EUROPE

0.8%

EASTERN EUROPE



## differentiating in the baby care market<sup>2</sup>

### BRAND BUILDING THROUGH PARTNERSHIPS

Character licensing, a staple in diapers, is a unique way to feature limited edition prints that connect with consumers.

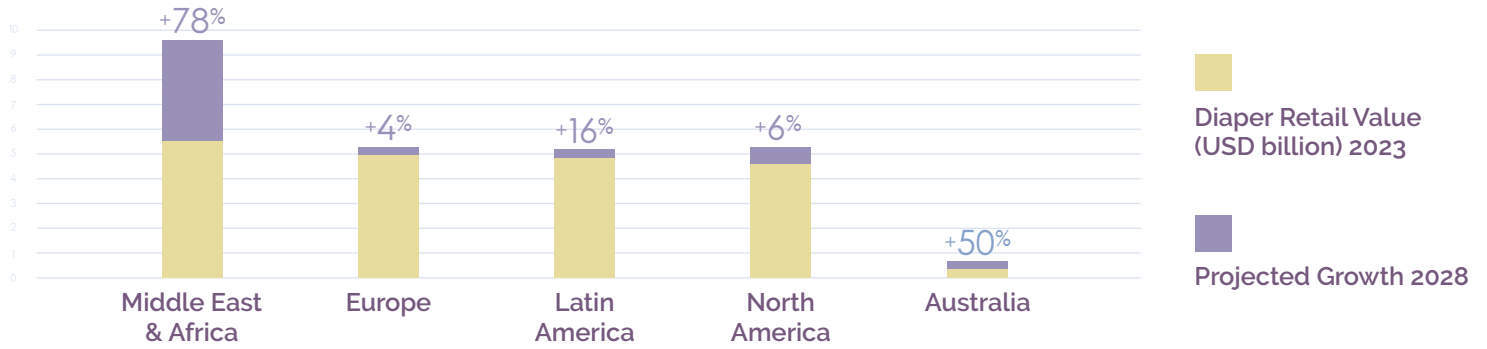
### INVESTING IN SKIN HEALTH

Ontex introduced a new nappy/diaper core technology called Climaflex in 2022. This new technology claims to keep the baby's skin protected as it has a dual-layer core in which one layer rapidly attracts liquid and a second layer locks it in firmly, even during extensive movement.



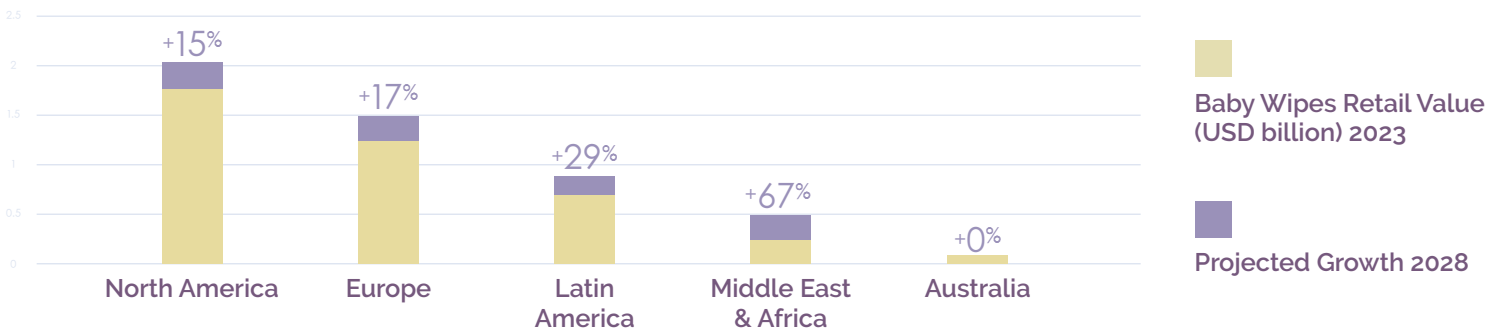
## diaper market outlook

**DIAPER MARKET SIZE AND 5 YEAR PROJECTED GROWTH RATE<sup>1</sup>**  
(USD BILLION): GLOBAL



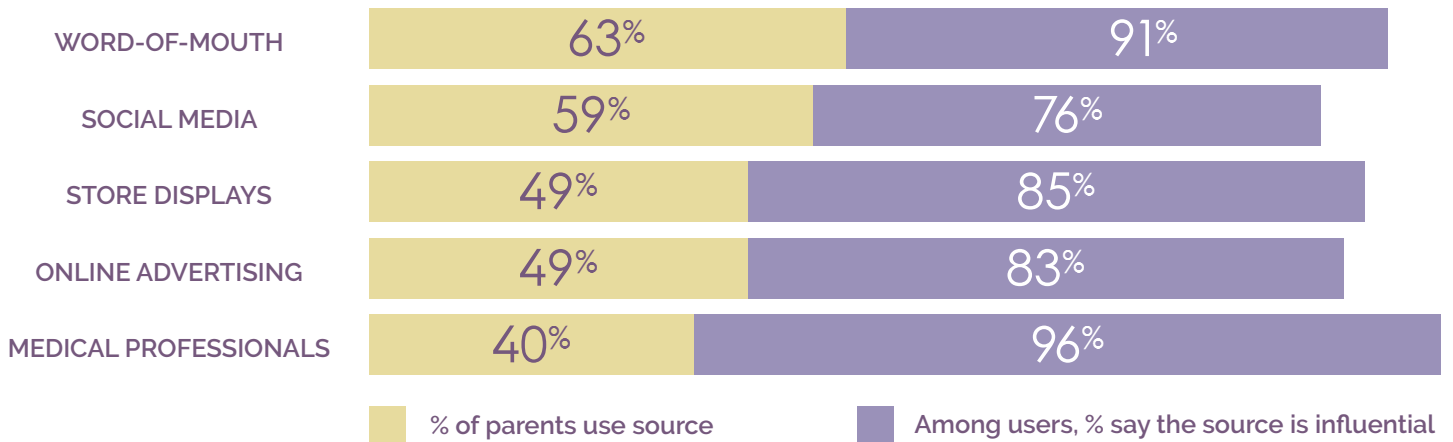
## wipes market outlook

**BABY WIPES MARKET SIZE AND 5 YEAR PROJECTED GROWTH RATE<sup>1</sup>**  
(USD BILLION): GLOBAL



## parent considerations

### How do parents decide what to buy?<sup>3</sup>



### Where are parents purchasing?<sup>3</sup>

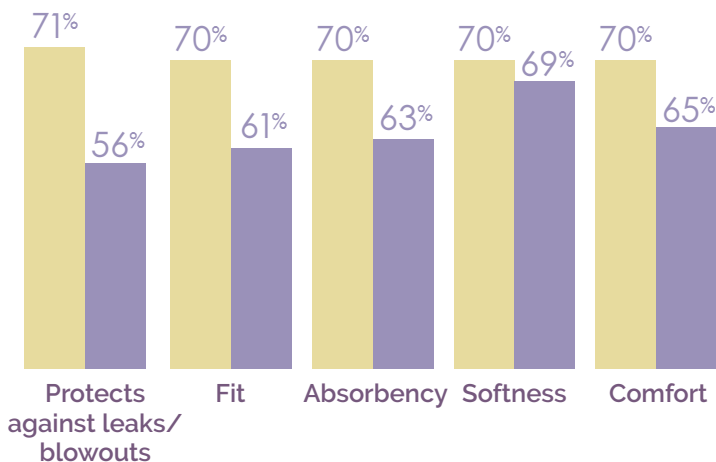


### What's important to parents?<sup>3</sup>

Consider Very Important (Top 2) | Believe Cotton Delivers Best

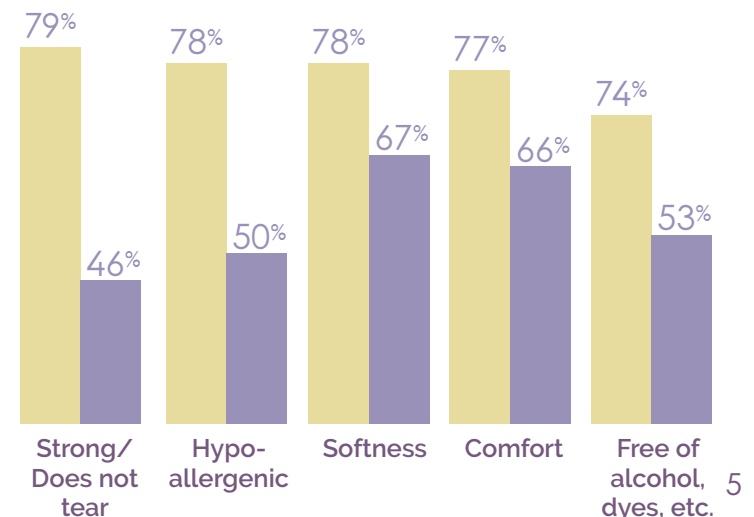
#### DIAPERS

Parents will pay for performance. Comfort, softness, and absorbency are all top purchase drivers - and areas where cotton excels.

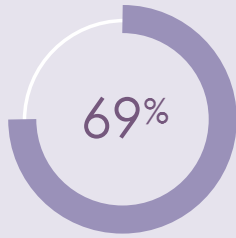


#### WIPES

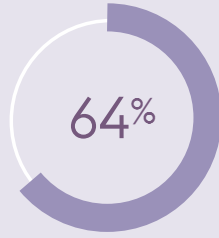
Strength, skin safety, and softness are all top considerations for parents when it comes to baby wipes, making cotton a natural choice.



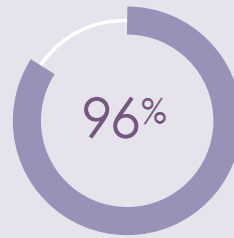
## parents prefer cotton<sup>3</sup>



of U.S. parents/  
guardians **believe**  
cotton is used in their  
disposable diapers



**prefer** their disposable  
diapers be made  
from cotton



are **interested** in  
disposable baby  
diapers and wipes  
that contain cotton



look for fiber content  
information when  
purchasing diapers  
or wipes

## the power of the Seal is real<sup>3</sup>

**After 50 years of marketing support from Cotton Incorporated,** the Seal of Cotton trademark is widely recognized and trusted by consumers – and the baby care category is no exception.

**75%** of parents are familiar with the Seal of Cotton trademark. Among those, **93%** agree that baby care products with the Seal are better quality than those without, and **85%** are willing to pay more for baby care products featuring the Seal.





*Would like brands to disclose fiber ingredients on:*

94%

Disposable baby diapers

93%

Disposable baby wipes



## what will you create?

To feature the Seal of Cotton trademark on your products, contact your Cotton Incorporated account representative.

Find out more at [CottonWorks.com/BabyCare](https://CottonWorks.com/BabyCare),  
Or reach out to [Nonwovens@CottonInc.com](mailto:Nonwovens@CottonInc.com)

Cary

New York

Hong Kong

Shanghai

Mexico City



Cotton  
Incorporated

The brands used in this report are purely illustrative without implying endorsement. Cotton brands can be found at [CottonWorks.com/Sourcing](https://CottonWorks.com/Sourcing) AMERICA'S COTTON PRODUCERS AND IMPORTERS Service Marks/Trademarks of Cotton Incorporated. ©2024 Cotton Incorporated Baby Care Market Report. All rights reserved.

<sup>1</sup> Euromonitor International 2024, Cotton Incorporated Market & Insights Dashboard

<sup>2</sup> Euromonitor International 2024, Cotton Incorporated Market & Insights Dashboard SOURCE NOTATION: 1. Hypoallergenic (58.4%) 2. Soft (45.5%) 3. Natural (42.3%) 4. Fragrance Free (40.1%) 5. Sensitive (39.3%)

<sup>3</sup> Cotton Incorporated's 2024 Baby Care Survey, N=499 U.S. parents/guardians