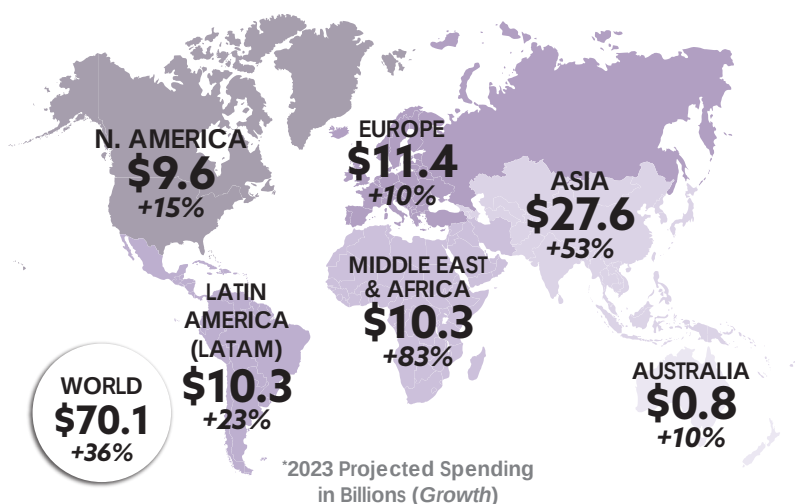


The global market for baby diapers and wipes is strong and growing, as consumers across the world are expected to spend \$70.1 billion on these products by 2023. Developing markets will see the most robust growth, as increased buying power allows more parents to choose commercial baby care products for their children. Enhance products with cotton, a trusted fiber with the properties consumers value in diapers and wipes.

INDUSTRY OUTLOOK²

2018-2023*



KEY INSIGHTS

80%

WORRY ABOUT CHOOSING THE BEST PRODUCTS FOR THEIR CHILDREN

Parents need baby care products they can trust.

82%¹

PREFER COTTON & COTTON BLENDS FOR BABY CLOTHING

Cotton products bring a sense of comfort and familiarity.

74%

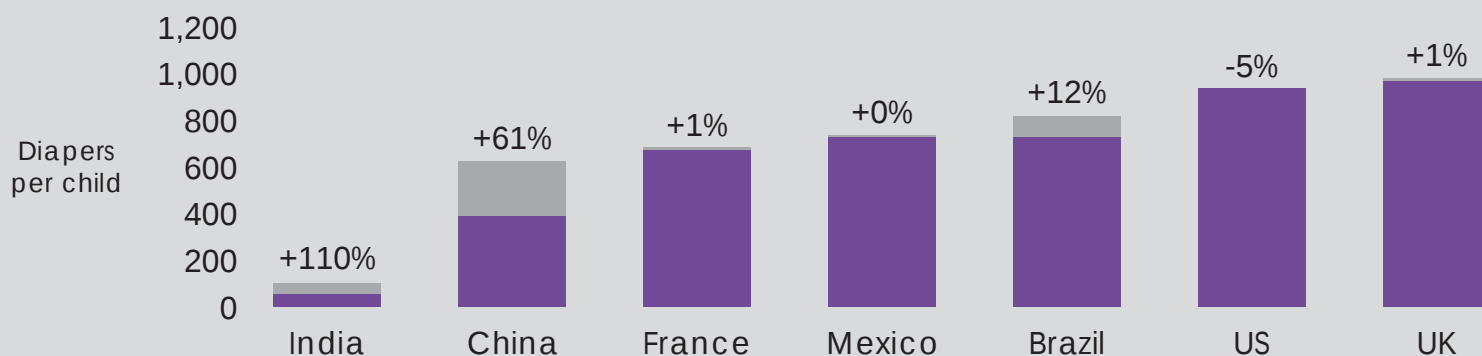
EXPECT DISPOSABLE DIAPERS & WIPES TO BE MADE OF COTTON

Give parents peace of mind with baby care products made of cotton.

DEVELOPING MARKETS²

■ 2023 (Projected) ■ 2018

Diaper use is expanding in developing markets (India, China, Brazil)



INFO: MARKETINFORMATION@COTTONINC.COM LIFESTYLEMONITOR.COTTONINC.COM

All content sourced from Cotton Incorporated's 2018 Global Baby Care Study except where noted. Additional Sources: ¹CCI & Cotton Incorporated's 2018 Global Lifestyle Monitor survey; ²2019 Euromonitor International Apparel & Footwear System. ©2020 Cotton Incorporated.

MARKET OPPORTUNITIES

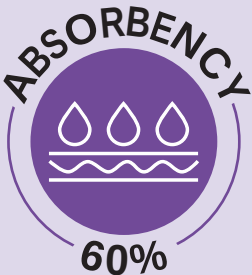
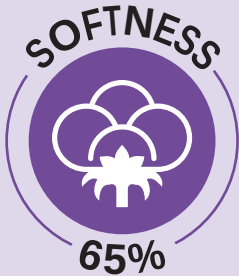
As they search for what is best for their children, cotton is a familiar and trusted fiber to today's anxious parents. Consumers connect cotton with the attributes they value most in diapers and wipes and that drive their purchases. Moreover, with increasing concern for the environment, today's parents also view cotton as the most sustainable material for their baby care products. Using the familiar Seal of Cotton trademark, brands can add value to their products by signaling them as better quality by containing this trusted fiber.

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

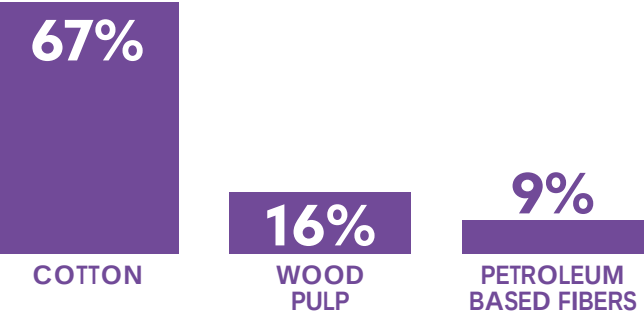
- Baby Care Study participant, U.S.



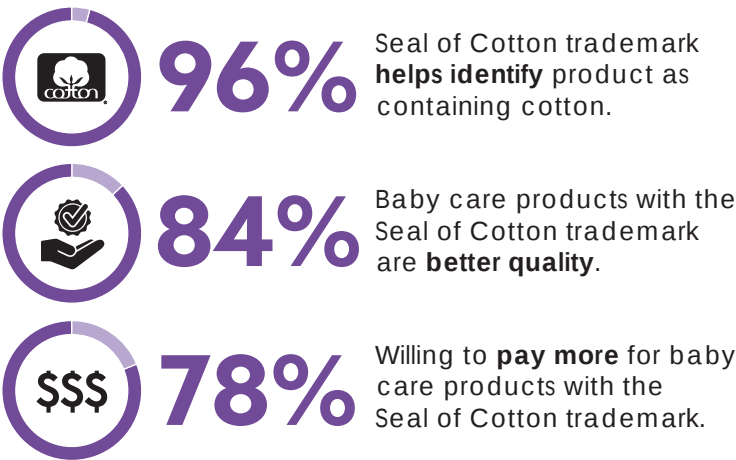
IMPORTANT FEATURES WHEN PURCHASING BABY CARE PRODUCTS



Percent who say the following fibers deliver best on sustainability.



Environmentally Friendly



All content sourced from Cotton Incorporated's 2018 Global Baby Care Study except where notated. Additional Sources: ¹CCI & Cotton Incorporated's 2018 Global Lifestyle Monitor survey; ²2019 Euromonitor International Apparel & Footwear System. ©2020 Cotton Incorporated.