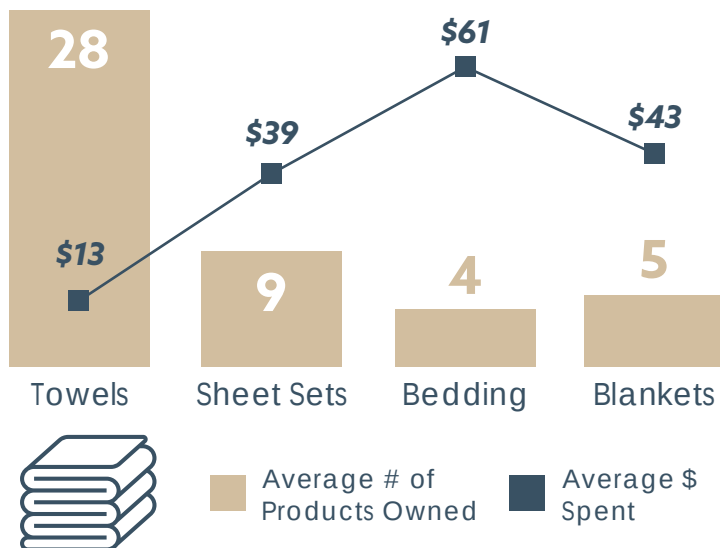


COTTON INCORPORATED'S SUPPLY CHAIN INSIGHTS HOME TEXTILES

IN THE UNITED STATES

U.S. consumers spent \$66.4 billion on home textile products in 2019. While a drop in spending due to the COVID-19 pandemic is expected in 2020, this market is projected to recover by 2022 and to show a 5 year growth of 8.3% with \$72 billion spent in 2024¹. Consumers seek comfort in soft, fluffy towels, sheets, bedding, and blankets; important qualities during this global crisis, as 79% of U.S. consumers say they “just want to curl up in a cozy bed.”²



KEY INSIGHTS

86%

BELIEVE QUALITY SHEETS AND BEDDING HELP YOU SLEEP BETTER.

Quality is a key purchase driver.

73%

SAY 100% COTTON IS IMPORTANT FOR HOME TEXTILES.

Consumers see the role fiber plays in softness, quality, function, and comfort.

61%

LOOK TO DIGITAL SOURCES FOR INSPIRATION.

Lean into digital as consumers look to make their home a comfortable refuge.

PURCHASE DRIVERS

Sheets & Bedding

- Comfort 90%
- Quality 86%
- Durability 83%
- Softness 83%
- Price 80%

Towels

- Quality 86%
- Durability 85%
- Softness 84%
- Price 80%
- Absorbency 77%

58% say it is important to know fiber content of home textile products because it tells them:

Sheets & Bedding

- Softness 44%
- Quality 42%
- Temp Control 38%
- Comfort 37%
- Sweat Control 29%

Towels

- Softness 41%
- Quality 39%
- Absorbency 33%
- Washes Clean 32%
- Comfort 29%



say 100% cotton is important to them when shopping for home textiles

78%

consumers willing to pay more for quality.



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

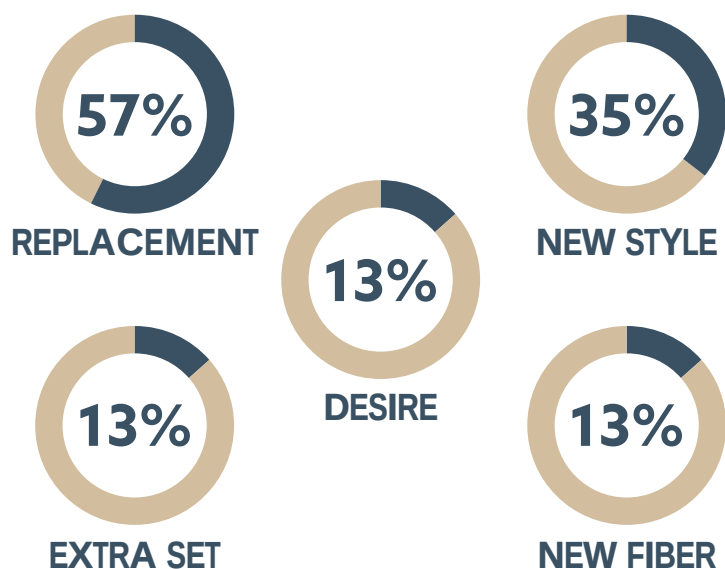
All content sourced from Cotton Incorporated's 2020 Home Textiles survey, a survey of 500 U.S. consumers conducted on February 6, 2020. Additional Sources: ¹2020 Euromonitor International Economics and Consumers Annual Data; ²Cotton Incorporated's 2020 COVID-19 Consumer Response Survey. AMERICA'S COTTON PRODUCERS AND IMPORTERS. Service Marks/Trademarks of Cotton Incorporated. ©2020 Cotton Incorporated.

MARKET OPPORTUNITIES

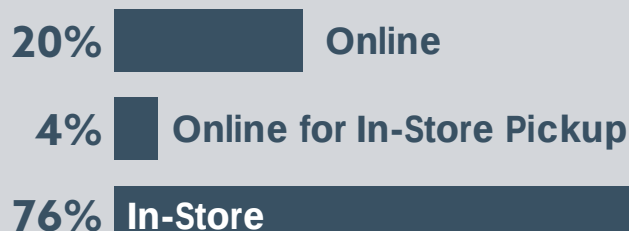
Physical stores play a strong role in consumers' home textile shopping journey, from store displays for inspiration to in-store purchasing. In the COVID-19 era, brands and retailers can ramp up their online efforts with solutions such as quality and money-back guarantees that allow consumers to try new products risk free.

TOP
5

REASONS TO PURCHASE NEW HOME TEXTILES



METHOD OF LAST PURCHASE MADE



WHERE PURCHASES WERE MADE

Sheets & Bedding

• Mass Merchant	46%
• Department Store	22%
• Online Only	12%
• Home Specialty	11%

Towels

• Mass Merchant	60%
• Department Store	22%
• Online Only	5%
• Home Specialty	7%

SOURCES OF INSPIRATION



SOCIAL MEDIA SOURCES OF INSPIRATION

(among those who get home textile ideas from social media, N=141)

