

THE GLOBAL BABY CARE MARKET:
PRESENT & FUTURE GROWTH

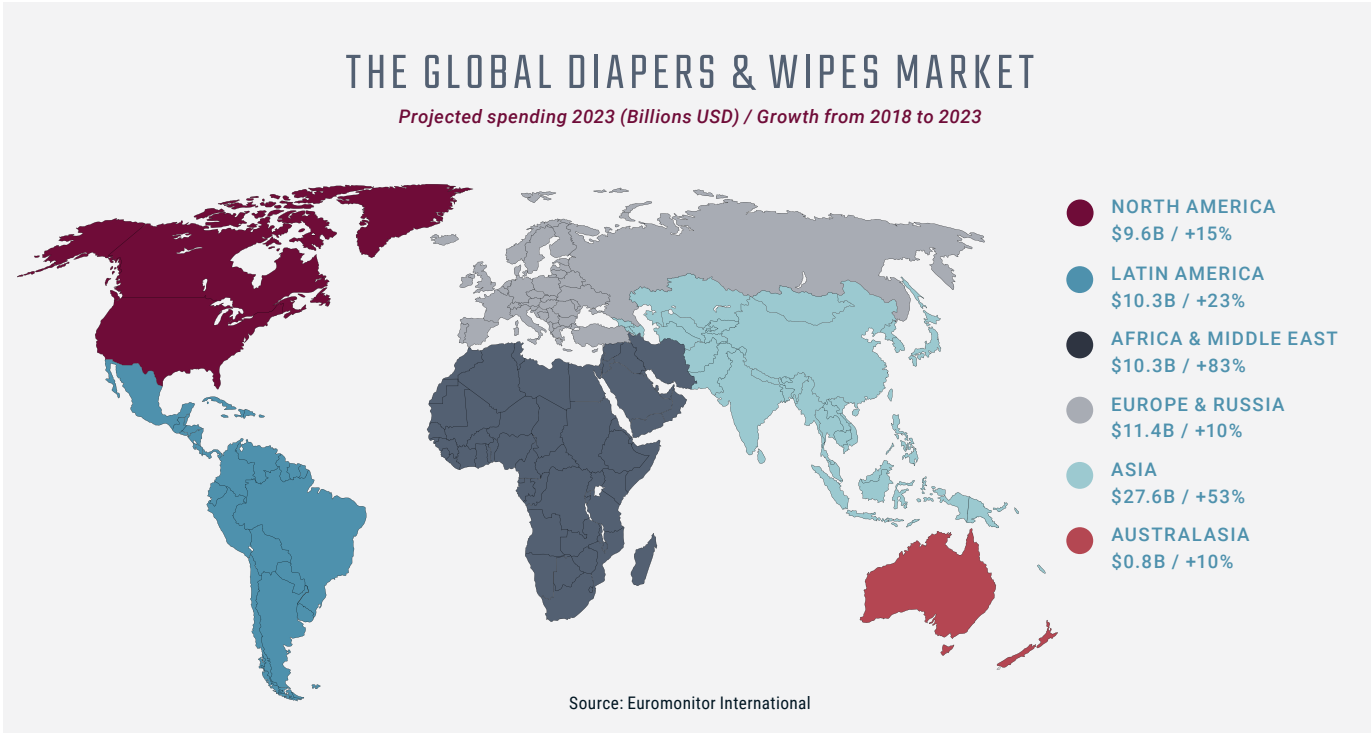




WHEN PARENTS TRUST YOU,
THERE'S GROWTH AHEAD.

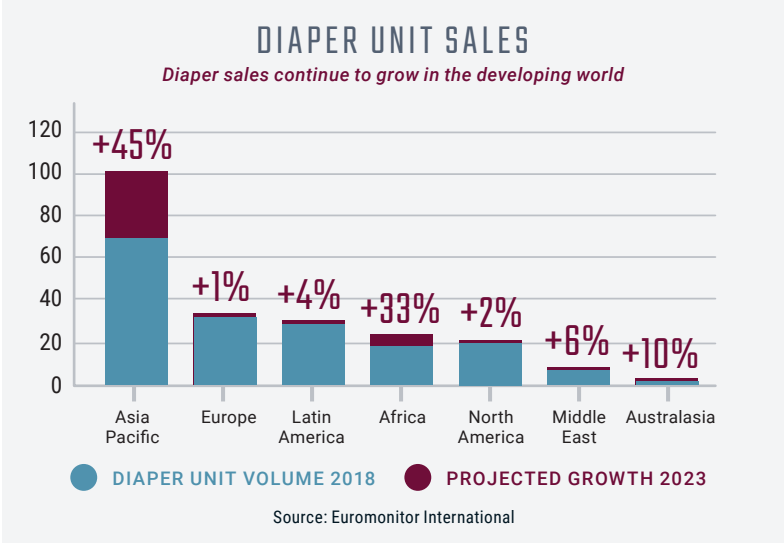
WHERE IS THE BABY CARE MARKET BOOMING?

The diaper and baby wipe markets are projected to increase 36% over 5 years to \$70.1 billion dollars in sales in 2023, with the strongest growth projected in Africa and Asia. Online search and mobile apps are growing in use and influence. Family and friends, as well as medical professionals, are highly influential in parents' purchasing decisions. And an increasing share of diapers and wipes are being purchased online.



DIAPER MARKET OUTLOOK

The global diaper industry sold 182.3 billion diapers in 2018, with a projected growth of 36% in value and 22% in volume by 2023. The Asia Pacific region is projected to grow the fastest and remain the largest market, reaching sales of 101 billion diapers by 2023, up 45% from 2018.



PERFORMANCE COUNTS

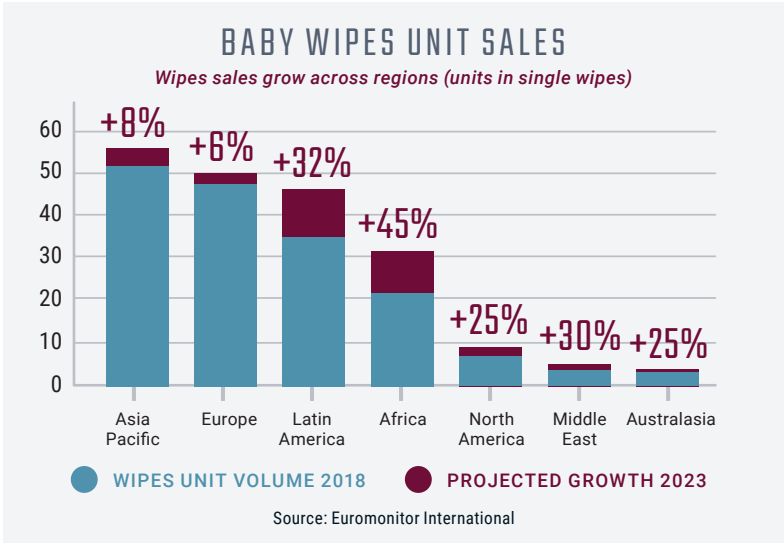
Parents say that when it comes to diapers, their top purchase drivers are protection against leaks, absorbency, comfort, and staying dry next to their baby's skin.

PERCENT OF PARENTS WHO SAY COTTON DELIVERS BEST ON:

- 60% Absorbency
- 66% Comfort
- 56% Stays dry next to skin

WIPES MARKET OUTLOOK

The global wipes Industry totaled 173 billion wipes sold in 2018 and is expected to grow 19% by 2023 to top 200 billion. All regions will see substantial growth with the Asia Pacific region and Latin America leading the way. Businesses should not lose sight of North America and Europe due to single digit growth as these markets will continue to lead in volume.



COMFORT COUNTS

Parents say that when it comes to wipes, their top purchase drivers are hypoallergenic properties, softness and comfort.

PERCENT OF PARENTS WHO SAY COTTON DELIVERS BEST ON:

- 58% Hypoallergenic
- 65% Softness
- 66% Comfort

PARENTS TRUST COTTON

The vast majority of parents perceive cotton to be the most sustainable and natural fiber for diapers and wipes. In fact, two-thirds of global consumers say that compared to other fibers, cotton is best on environmental-friendliness and natural materials.

And because consumers trust cotton to be natural and earth-friendly, 3 out of 4 parents expect their baby care products to contain cotton, with even higher numbers in China and Latin America, approaching 90%.



COTTON'S HALO EFFECT

Parents are familiar with the Seal of Cotton and express confidence in the quality and environmental-friendliness of products that feature this seal. 84% of parents agree that baby care products with this logo are better quality, and 78% are willing to pay more for baby care products that feature it.

THE NATURAL CHOICE FOR GENERATIONS TO COME

As the global baby care market continues to grow, so do parents' demand for natural, safe and earth-friendly products for their babies. So when it comes to choosing diapers and wipes, parents are turning to brands they can rely on. Cotton is a brand parents recognize as reliable, trustworthy, and sustainable, which means the market for cotton is positioned to keep growing to meet the needs of parents today—and parents tomorrow.

To learn more about cotton as a natural leader in the global baby care market, visit cottonworks.com/nonwovens.



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Data presented are from Cotton Incorporated's 2018 Baby Care Survey, unless cited.