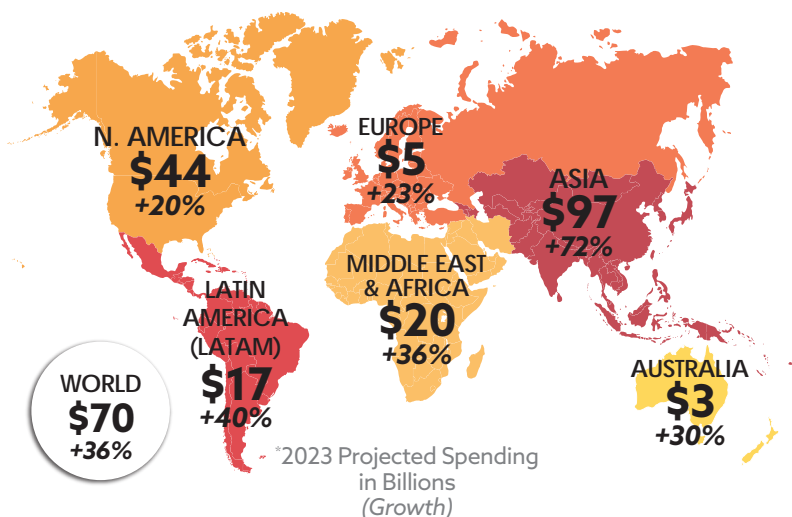


# COTTON INCORPORATED'S SUPPLY CHAIN INSIGHTS CHILDRENSWEAR

The global market for childrenswear is projected to reach \$239 billion by 2023. The five-year growth of 40% in childrenswear outpaces growth in overall apparel, projected at 27% from 2018-2023. Markets in Asia will see the largest growth, as parents purchase fashionable clothing for their children. In addition to these in-store experiences, online tools allow children and their parents to browse and buy clothing together.

## INDUSTRY OUTLOOK 2018-2023\*



## KEY INSIGHTS

**86%**

PURCHASE CHILDRENSWEAR ONLINE

E-commerce is an essential channel for parents and their children to browse and buy clothing.

**50%**

ALLOW THEIR CHILDREN TO INFLUENCE CLOTHING PURCHASES

Parents and children negotiate clothing purchases, as they balance differing views on style and function.

**75%**

ASSOCIATE COTTON CLOTHING WITH COMFORT

In the end parents want their children to be comfortable in their clothing, and rate cotton highest in comfort.

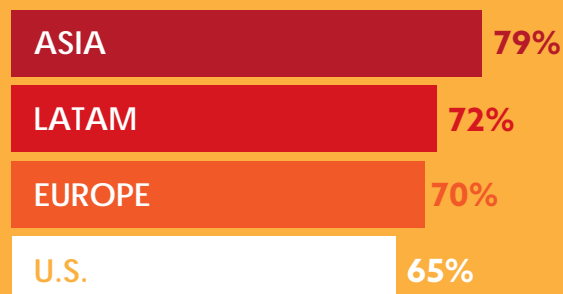
## RETAIL CHANNELS FOR CHILDREN'S CLOTHING

**96%**



GLOBAL CONSUMERS WHO PURCHASE CLOTHING IN PHYSICAL STORES

Shop online channels of traditionally brick-and-mortar stores (department stores, mass merchants, etc.)



Use online sources to gather childrenswear inspiration



**83%**

ASIA



**74%**

LATAM



**52%**

EUROPE



**52%**

U.S.



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

Source: Cotton Council International and Cotton Incorporated's 2019 Global Childrenswear Study. Approximately 8,000 consumers from 8 countries were surveyed. Countries included Brazil, China, France, Germany, India, Mexico, the U.K., and the U.S. Additional Sources: Euromonitor International ©2019 Cotton Incorporated.

# SHOPPING JOURNEY

**T**he childrenswear shopping journey is marked by negotiation between parent and child, especially as children age and develop a growing sense of personal style. Beyond these struggles, parents look for clothes that will be comfortable for their children and will last – and they rate cotton highest in these attributes. Brands and retailers can help parents by providing comfortable childrenswear for their opinionated kids.

## PARENTS' IMAGE AT STAKE

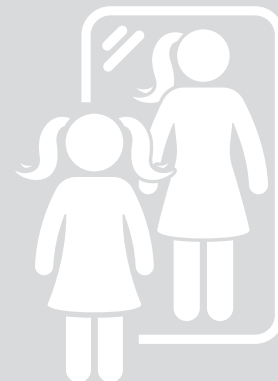
*Percentage of parents who say child's dress is a reflection on themselves*

ASIA **91%**

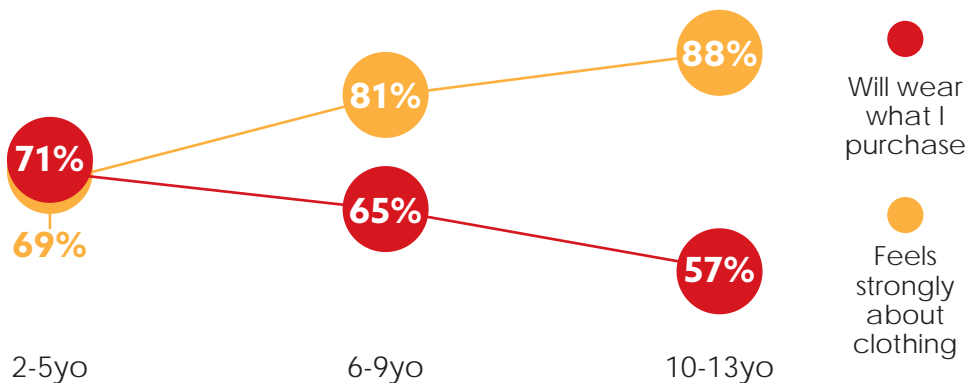
LATIN AMERICA **75%**

U.S. **80%**

EUROPE **71%**



## STRUGGLES GROW WITH AGE



## TOP RATED ATTRIBUTES

*Percentage who say factor is very important*



**85%**  
Comfortable



**84%**  
Fits



**83%**  
Not Itchy



**76%**  
Soft



**76%**  
Durable

## COTTON PERFORMS

*Percentage who associate cotton clothing with factor*



**85%**  
Comfortable



**76%**  
Soft



**84%**  
Fits



**76%**  
Durable



Source: Cotton Council International and Cotton Incorporated's 2019 Global Childrenswear Study. Approximately 8,000 consumers from 8 countries were surveyed. Countries included Brazil, China, France, Germany, India, Mexico, the U.K., and the U.S. Additional Sources: Euromonitor International ©2019 Cotton Incorporated.