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**

<table>
<thead>
<tr>
<th>Region</th>
<th>2023 Projected Spending (in Billions)</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>N. AMERICA</td>
<td>$44</td>
<td>+20%</td>
</tr>
<tr>
<td>LATAM (LATAM)</td>
<td>$17</td>
<td>+40%</td>
</tr>
<tr>
<td>EUROPE</td>
<td>$5</td>
<td>+23%</td>
</tr>
<tr>
<td>MIDDLE EAST &amp; AFRICA</td>
<td>$20</td>
<td>+36%</td>
</tr>
<tr>
<td>ASIA</td>
<td>$97</td>
<td>+72%</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>$3</td>
<td>+30%</td>
</tr>
<tr>
<td>WORLD</td>
<td>$70</td>
<td>+36%</td>
</tr>
</tbody>
</table>

**KEY INSIGHTS**

- **E-commerce** is an essential channel for parents and their children to browse and buy clothing.
- Parents and children negotiate clothing purchases, as they balance differing views on style and function.
- 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%** of global consumers who purchase clothing in physical stores
  - **86%** shop online channels of traditionally brick-and-mortar stores (department stores, mass merchants, etc.)
  - **79%** of parents in Asia allow their children to influence clothing purchases
  - **75%** associate cotton clothing with comfort

- **Use online sources to gather childrenswear inspiration**
  - **83%** of parents in Asia use online sources to gather childrenswear inspiration
  - **74%** of parents in LATAM use online sources to gather childrenswear inspiration
  - **52%** of parents in Europe and the U.S. use online sources to gather childrenswear inspiration

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.
The 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

- 2-5yo: 71% Will wear what I purchase
- 6-9yo: 81%
- 10-13yo: 88%

- 2-5yo: 69% Feels strongly about clothing
- 6-9yo: 65%
- 10-13yo: 57%

### Top Rated Attributes
Percentage who say factor is very important

- **Comfortable**: 85%
- **Soft**: 76%
- **Fits**: 84%
- **Not Itchy**: 83%
- **Durable**: 76%

### Cotton Performs
Percentage who associate cotton clothing with factor

- **Comfortable**: 85%
- **Soft**: 76%
- **Fits**: 84%
- **Durable**: 76%

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.