

Global Baby Nappies/Diapers/Pants Update: Industry Potential and Consumer Preferences

July 2020

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Scope

Key findings

Global long-term outlook optimistic with significant untapped potential

Potential lingering negative impact of COVID-19

Healthy long-term growth across MEA and Asian markets

Africa: lifestyle shifts and improved product access help demand

Alert as per capita reaching high levels in some developing markets

Rising per capita use reduces the impact of soft drivers in China

Tailoring innovation to preferred product features...

...and understanding consumer willingness to pay for those features

Case of China: natural, soft and high quality top of the mind

Case of the US: functionality and value top consumer agenda

Case of Brazil: high quality, leak protection and value for money lead

Retailers drive private label and exclusive brands to draw customers

Pants format: continuing growth globally

New affordable options emerge to aid adoption of pants

Unicharm enhances its mid- and premium range pants

Expansion in e-commerce further boosted by COVID-19

Unconventional platforms continue to rise

Facebook stands out in purchase related-activities

Subscription services tap into desire for tailored approach

Detecting the nuances of delivery services...

...and store-based shopping is still very much relevant

Strengthening omnichannel approach in mid to long term

COVID-19 impact: financial instability and category disruption

Our COVID-19 themes reflect shifting consumer behaviour

COVID-19 themes in nappies/diapers: re-evaluating brand value, channel shifts

Key takeaways (1): meet immediate and mid-term needs

Key takeaways (2): meeting long-term needs

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