

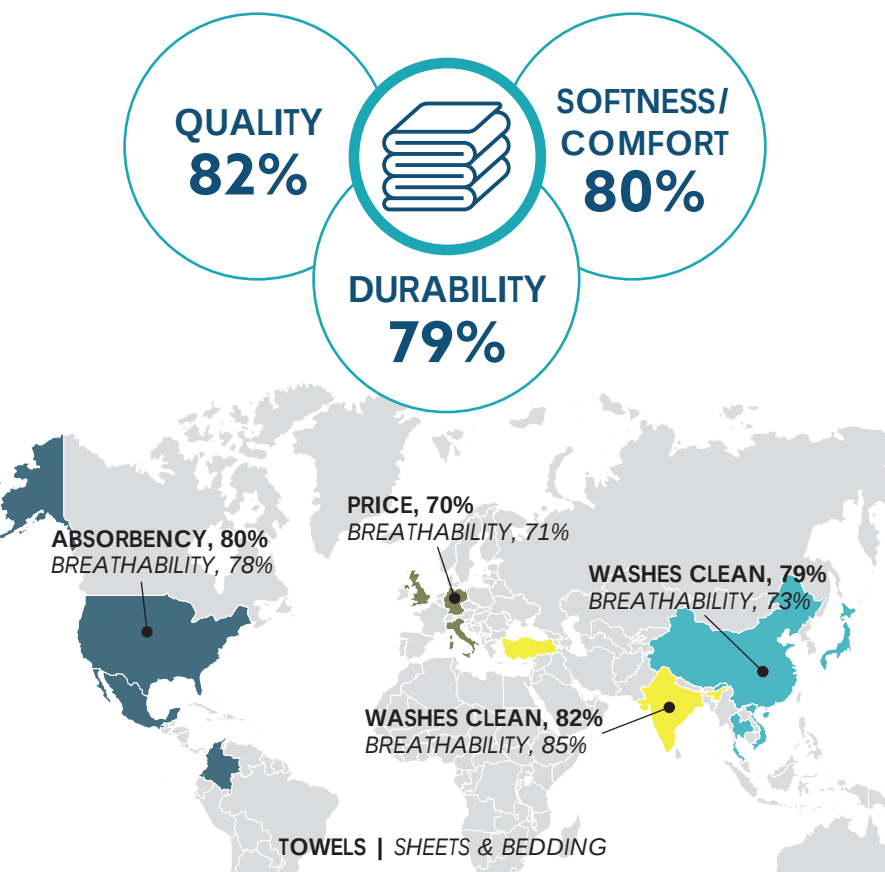
COTTON INCORPORATED'S SUPPLY CHAIN INSIGHTS **HOME TEXTILES**

GLOBALLY

Globally, consumers spent \$201 billion on home textile products in 2019¹. 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 12.4% with \$226 billion spent in 2024¹. Consumers in each of 12 countries surveyed prize towels, sheets, and bedding that are high quality, soft, comfortable, and durable. They see the role fiber plays in delivering these purchase drivers, as 79% say that 100% cotton is important to them when purchasing home textiles.

PRIMARY PURCHASE DRIVERS

All Home Textiles



KEY INSIGHTS

80%

BELIEVE QUALITY SHEETS AND BEDDING HELP YOU SLEEP BETTER

Meet consumers needs with this key purchase driver.

85%

ARE MORE LIKELY TO PURCHASE A SHEET MARKETED AS "SOFT AND COMFORTABLE"

Highlight the attributes consumers seek most.

55%

EXPERIENCE TWO OR FEWER NEGATIVE ISSUES WITH TEXTILES MADE FROM COTTON

Use cotton in home textiles to help consumers avoid negative experiences

75%

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

TOWELS

- QUALITY, 50%
- SOFTNESS, 46%
- ABSORBENCY, 40%

SHEETS & BEDDING

- QUALITY, 49%
- SOFTNESS, 42%
- KEEPS WARM/COOL, 40%

79%

say 100% cotton is important for home textiles.



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

All content sourced from Cotton Incorporated's 2020 Home Textiles survey, a survey of 6,000 consumers in the U.S., China, Japan, Vietnam, Thailand, India, Turkey, Mexico, Colombia, Germany, Italy, and the United Kingdom conducted from February 6 – April 8, 2020.

Additional Sources: ¹2020 Euromonitor International Economics and Consumers Annual Data

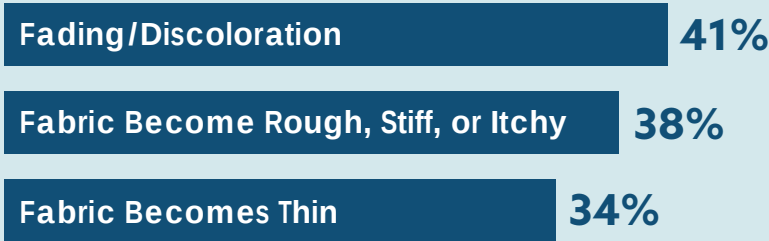
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MARKET OPPORTUNITIES

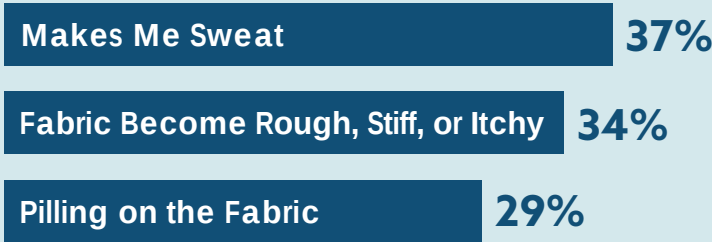
Negative issues such as colors fading and fabric becoming rough or itchy can cause frustration and disappointment for home textiles consumers. While unavoidable over time, consumers report fewer issues when they purchase home textiles made of cotton. Brands can add value and meet key purchase drivers of quality and durability with the addition of performance features, including odor and stain resistance.

MOST COMMON ISSUES

TOWELS



SHEETS & BEDDING



FEWER ISSUES EXPERIENCED WITH COTTON

Average number of negative issues experienced:

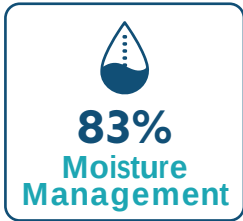
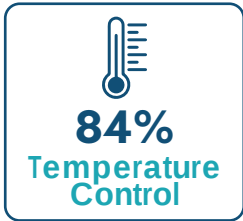
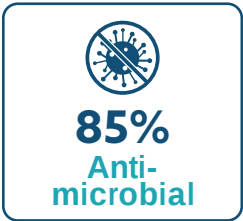
2 issues
100% cotton home textiles

3 issues
Manmade fiber (polyester or rayon) or blend



PERFORMANCE FEATURES DESIRED

94% of consumers would pay more for at least one performance feature
Top Features (percentage who would pay more for feature):



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