

# Disposable Baby Products - US - April 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



*"Economic circumstances and falling birth rates are decreasing product demand; private label is competitive; and parents are shopping online for deep discounts. Market players will need to better compete with private label and expand the category while retailers will need to convince parents to return to shopping in stores."*

– Gabriela Mendieta, Home & Personal Care Analyst

## In this report we answer the key questions:

- Branded products, specifically diapers and training pants, are struggling to compete with private label. How can brands better differentiate products in order to recapture sales and market share?
- Difficult economic circumstances and falling birth rates have had a negative impact on this category. How can market players grow the market beyond waiting for economic recovery?
- Online retailers are becoming a greater force in the market. What can traditional retailers do to convince parents to come back to stores?

The U.S. disposable baby product market was strongly impacted by the onset of the recession in 2008 and the overall market has seen flat to declining sales for the past few years. In 2012, total U.S. retail sales for disposable baby products are \$7.5 billion, which is nearly unchanged from the sales observed in 2007, reflecting the market's stagnant performance. Difficult economic circumstances have resulted in financially strapped parents developing an economizing mindset along with declining fertility and birth rates resulting in a decreased demand for disposable baby products.

The performance of the overall market is also strongly dictated by how the disposable diapers and training pants segment performs. Premium diaper brands have struggled to compete with private label, whose quality has improved significantly. However, there are a few bright spots in the market. The baby wipes/moist towelettes and baby care needs segments have both boasted strong sales growth, and Mintel expects that upward progression to continue. Parents are investing in their babies' and toddlers' personal care routines, particularly on products that come into direct contact with their children's skin.

For this market to return to prerecession growth levels, economic recovery will be important because economic circumstances impact both product demand and parents' shopping behaviors. It will also be important that market players focus on product innovation in order to convince parents to trade up to premium brands as a means to reinvigorate sales, which will be especially important in the disposable diapers and training pants segment. Companies and brands could also consider developing new types of disposable baby products to expand the market beyond the current product set and to offer parents greater ease and convenience of caring for their babies and toddlers.

This report analyzes U.S. sales performance of disposable baby product sales in the past five years, the market forecast through 2017, and how different factors, such as a baby personal care and disposable diaper claims, influence consumer shopping behaviors. Household usage, product purchase incidence, information sources that inform product and brand decisions, parents' current frustrations with disposable diapers, and attitudes toward disposable baby products are also explored in this report.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@mintel.com)

## DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know  
 Definition  
 Data sources  
 Sales data  
 Consumer survey data  
 Advertising creative  
 Abbreviations and terms  
 Abbreviations  
 Terms

### Executive Summary

#### The market

Figure 1: Total U.S. retail sales and fan chart forecast of disposable baby product market, at current prices, 2007-17

#### Market factors

##### Apprehensive consumers affect market, particularly diapers segment

Figure 2: University of Michigan's index of consumer sentiment (ICS), 2007-12

##### U.S. fertility and birth rates declining

##### Growing concern around chemicals and ingredients in products

#### Segment performance

Figure 3: Total U.S. retail sales of disposable baby products, by segment, at current prices, 2010-12

#### Retail channels

Figure 4: Share of U.S. retail sales of disposable baby products, by channel, at current prices, 2010 and 2012

#### Market players

Figure 5: Share of MULO sales of disposable products, by leading companies, 2012

#### The consumer

##### Nearly universal penetration among households with children 3 and under

Figure 6: Household use of disposable baby products, August 2011-12

Figure 7: Baby products purchased in the past three months, February 2013

##### Younger parents purchase a greater variety of products

Figure 8: Baby products purchased in the past three months, by age, February 2013

##### Parents rely on traditional information sources for general childcare information and brand decisions

Figure 9: Information sources utilized by parents, by any rely, February 2013

##### Moisturizing/hydrating most sought out claim in baby personal care products

Figure 10: Claims influencing purchase of baby personal care products, February 2013

##### For diapers, functional and performance claims resonate most strongly

Figure 11: Claims influencing purchase of diapers/training pants, February 2013

##### Cost is parents' main source of frustration with disposable diapers

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Top diaper/training pants frustrations among parents, February 2013

What we think

## Issues in the Market

Branded products, specifically diapers and training pants, are struggling to compete with private label. How can brands better differentiate products in order to recapture sales and market share?

Difficult economic circumstances and falling birth rates have had a negative impact on this category. How can market players grow the market beyond waiting for economic recovery?

Online retailers are becoming a greater force in the market. What can traditional retailers do to convince parents to come back to stores?

## Insights and Opportunities

Create more disposable products

Support parents through potty training process

## Trend Applications

Trend: Perfecting the Details

Trend: Prove It

Mintel Futures: Brand Intervention

## Market Size and Forecast

Key points

Flat to little growth expected in the coming years

Sales and forecast of disposable baby products market

Figure 13: Total U.S. retail sales and forecast of disposable baby product market, at current prices, 2007-17

Figure 14: Total U.S. retail sales and forecast of disposable baby product market, at inflation-adjusted prices, 2007-17

Fan chart forecast

Figure 15: Total U.S. retail sales and fan chart forecast of disposable baby product market, at current prices, 2007-17

## Market Drivers

Key points

Shaky consumer confidence detrimental, particularly to diaper sales

Figure 16: University of Michigan's index of consumer sentiment (ICS), 2007-13

U.S. fertility and birth rates falling

Figure 17: Fertility rate and number of births, 2001-11

Figure 18: Fertility rate, by race and Hispanic origin of mother, 2000-11

Growing concern around product ingredients

## Competitive Context

Cloth diapers as alternative to disposable diapers

## Segment Performance

Key points

Diapers and training pants segment leads the market

Sales of disposable baby products, by segment

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Total U.S. retail sales of disposable baby products, by segment, at current prices, 2010 and 2012

## Segment Performance—Diapers and Training Pants

### Key points

Diapers and training pants the biggest, but most challenged segment

Sales and forecast of diapers and training pants

Figure 20: Total U.S. retail sales and forecast of diapers and training pants, at current prices, 2007-17

## Segment Performance—Baby Wipes and Moist Towelettes

### Key points

Baby wipes and moist towelettes boast strong sales growth

Sales and forecast of baby wipes and moist towelettes

Figure 21: Total U.S. retail sales and forecast of baby wipes and moist towelettes, at current prices, 2007-17

## Segment Performance—Baby Care Needs

### Key points

Baby care needs segment growing

Figure 22: Users of body and baby powder, by gender, August 2011-12

Figure 23: Users of baby oil and baby lotion, by gender, August 2011-12

Sales and forecast of baby care needs

Figure 24: Total U.S. retail sales and forecast of baby care needs, at current prices, 2007-17

## Retail Channels

### Key points

Majority of purchases taking place in mass merchandiser, supercenters, warehouse club stores, and online retailers

Sales of disposable baby products, by channel

Figure 25: Total U.S. retail sales of disposable baby products, by channel, at current prices, 2010-12

Figure 26: Total U.S. retail sales of disposable baby products, by channel, at current prices, 2007-12

## Natural Channel Marketplace

### Key points

Traditional channels now offer more natural/organic disposable baby products

Sales of disposable baby products in the natural channel

Figure 27: Natural supermarket sales of disposable baby products, at current prices, 2010-12

Figure 28: Natural supermarket sales of disposable baby products, at inflation-adjusted prices, 2010-12

Natural channel sales of disposable baby products by segment

Figure 29: Natural supermarket sales of disposable baby products, by segment, 2010 and 2012

Brands of note and innovators

## Leading Companies

### Key points

Disposable baby product market becoming highly competitive

MULO manufacturer sales of disposable baby products

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Disposable Baby Products - US - April 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: MULO sales of disposable baby products, by leading companies, 2012 and 2013

### Brand Share—Diapers and Training Pants

#### Key points

Specialized Huggies products perform well

Pampers struggles with Dry Max offerings

"Other" brands and private label show promise

MULO sales of diapers and training pants

Figure 31: MULO sales of diapers and training pants by leading companies, 2012 and 2013

### Brand Share—Baby Wipes and Moist Towelettes

#### Key points

Private label surpasses top manufacturers

Huggies sees success with simple baby wipe products

Pampers' performance emulates Huggies

MULO sales of baby wipes and moist towelettes

Figure 32: MULO sales of baby wipes and moist towelettes by leading companies, 2012 and 2013

### Brand Share—Baby Care Needs

#### Key points

Johnson & Johnson top company in baby care needs

"Other" companies becoming more competitive

Private label doesn't compete as strongly in baby personal care

MULO sales of baby care needs

Figure 33: MULO sales of baby care needs by leading companies, 2012 and 2013

### Innovations and Innovators

Demographic and "free from" claims most common among diaper and wipe launches

Figure 34: Diapers and wipes launches, by claims category, 2007-13

Botanical/herbal among most common claims in diapers and wipes

Figure 35: Diapers and wipes launches, by claims, 2007-13

Growing availability of private label products

New brands entering the baby care segment

Baby sun protection offerings more prevalent

Diaper designs give parents variety

"Mom and baby" together products emerging

Extra moisture appeals to parents

### Marketing Strategies

Overview of the key marketing themes

Theme: Touting long-lasting protection

Figure 36: Huggies, "stay dry" television ad, 2012

Figure 37: Pampers, "Happy morning" television ad, 2013

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Theme: Value positioning

Figure 38: Luvs, "Get it done" television ad, 2012

Figure 39: Huggies family dollar advertisement

## Theme: Emphasizing baby comfort, mobility

Figure 40: Pampers, "vertical climbers" television ad, 2012

Figure 41: Huggies Snugfit advertisement

## Theme: Aligning with good parenting

Figure 42: seventh generation social media

Figure 43: Johnson's baby, "baby knows" television ad, 2012

## Social Media

### Key points

### Key social media metrics

Figure 44: Key brand metrics, disposable baby products, March 2013

### Market overview

### Brand usage and awareness

Figure 45: Usage and awareness of selected disposable baby products brands, February 2013

### Interaction with brands

Figure 46: Interaction with selected disposable baby products brands, February 2013

### Online conversations

Figure 47: Percentage of consumer conversation by selected disposable baby products brands, February 19, 2013-March 18, 2013

Figure 48: Online mentions, selected disposable baby products brands, by day, February 19, 2013-March 18, 2013

### Where are people talking about disposable baby products brands?

Figure 49: Mentions by page type, selected disposable baby products brands, February 19, 2013-March 18, 2013

### What are people talking about online?

Figure 50: Luvs selected Twitter mentions, March 2013

Figure 51: Mentions by type of conversation, selected disposable baby products brands, February 19, 2013-March 18, 2013

Figure 52: Major areas of discussion surrounding disposable baby products brands, by day, February 19, 2013-March 18, 2013

Figure 53: Major areas of discussion surrounding disposable baby products brands, by page type, February 19, 2013-March 18, 2013

### Brand analysis

#### Pampers

Figure 54: Pampers key social media indicators, March 2013

#### Key online campaigns

#### What we think

#### Huggies

Figure 55: Huggies key social media indicators, March 2013

#### Key online campaigns

#### What we think

#### Johnson's Baby

Figure 56: Johnson's Baby key social media indicators, March 2013

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key online campaigns

What we think

Luvs

Figure 57: Luvs key social media indicators, March 2013

Key online campaigns

What we think

Aveeno

Figure 58: Aveeno key social media indicators, March 2013

Key online campaigns

What we think

Seventh Generation

Figure 59: Seventh Generation key social media indicators, March 2013

Key online campaigns

What we think

## Usage and Purchase of Disposable Baby Products

Key points

Disposable baby products enjoy high incidence of use and purchase

Figure 60: Household use of disposable baby products, August 2011-12

Figure 61: Baby products purchased in the past three months, February 2013

Lower-income households might be choosing more baths over buying wipes

Figure 62: Household use of disposable baby products, by household income, August 2011-12

Potty training likely cause for wipe and diaper usage decline in households with 3 year olds

Figure 63: Household use of disposable baby products, by individual ages of children in household, August 2011-12

Younger parents purchase greater variety of products

Figure 64: Baby products purchased in the past three months, by age, February 2013

## Usage Frequency

Key points

Diapers and baby wipes used most frequently

Figure 65: Frequency of use of disposable baby products, August 2011-12

## Information Sources

Key points

Family and doctors most common information sources

Figure 66: Information sources utilized by parents, by gender, February 2013

Figure 67: Information sources not utilized by parents, by gender, February 2013

Younger parents rely on "newer" information sources

Figure 68: Information sources utilized by parents by, age, February 2013

## Baby Personal Care Product Claims

Key points

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Moisturizing/hydrating most desired claim in baby personal care products

Figure 69: Claims influencing purchase of baby personal care products, by gender and age, February 2013

Parents with children under age 1 looking for variety of claims

Figure 70: Claims influencing purchase of baby personal care products, by children age, February 2013

## Diapers and Training Pants Product Claims

Key points

Functional and performance claims most influential

Figure 71: Claims influencing purchase of diapers/training pants, February 2013

Younger parents interested in claims that make them feel good about diaper products

Figure 72: Claims influencing purchase of diapers/training pants, by age, February 2013

Figure 73: Claims influencing purchase of diapers/training pants, by children age, February 2013

## Diapers Frustrations

Key points

Cost main source of frustration around diapers

Figure 74: Top diaper/training pants frustrations among parents, February 2013

Less affluent consumers most likely to be frustrated by leaks

Figure 75: Top diaper/training pants frustrations among parents, by household income, February 2013

## Baby Care Product Attitudes

Key points

Parents want others to think that their baby is clean and tidy

Figure 76: Attitudes toward disposable baby products, February 2013

Dads may have more loyalty to name brands

Figure 77: Agreement of attitudes toward disposable baby products, by gender, February 2013

Parents aged 25-34 may be more partial to name brands

Figure 78: Agreement of attitudes toward disposable baby products, by age, February 2013

## Cluster Analysis

Figure 79: Target clusters, February 2013

Cluster 1: Natural Nurturers

Opportunities

Cluster 2: Super Spenders

Opportunities

Cluster 3: Basic Buyers

Opportunities

Cluster 4: Conventional Caregivers

Opportunities

Cluster 5: Bare Bones

Opportunities

Cluster characteristic tables

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)



# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 80: Baby products purchased in the past three months, by target clusters, February 2013

Figure 81: Information sources utilized by parents, by target clusters, February 2013

Figure 82: Claims influencing purchase of baby personal care products, by target clusters, February 2013

Figure 83: Claims influencing purchase of diapers/training pants, by target clusters, February 2013

Figure 84: Top diaper/training pants frustrations among parents, by target clusters, February 2013

Figure 85: Agreement of attitudes toward disposable baby products, by target clusters, February 2013

## Cluster demographics

Figure 86: Target clusters, by demographic, February 2013

## Cluster methodology

## SymphonyIRI /Builders – Key Household Purchase Measures

### Overview of diapers

#### Disposable diapers

#### Consumer insights on key purchase measures

#### Brand map

Figure 87: Brand map, selected brands of disposable diapers, by household penetration, 52 weeks ending June 24, 2012

#### Brand leader characteristics

#### Key purchase measures

Figure 88: Key purchase measures for the top brands of disposable diapers, by household penetration, 52 weeks ending June 24, 2012

#### Disposable training pants

#### Consumer insights on key purchase measures

#### Brand map

Figure 89: Brand map, selected brands of disposable training pants buying rate, by household penetration, 52 weeks ending June 24, 2012

#### Brand leader characteristics

#### Key purchase measures

Figure 90: Key purchase measures for the top brands of disposable training pants, by household penetration, 52 weeks ending June 24, 2012

#### Baby wipes

#### Consumer insights on key purchase measures

#### Brand map

Figure 91: Brand map, selected brands of baby wipes buying rate, by household penetration, 52 weeks ending June 24, 2012

#### Brand leader characteristics

#### Key purchase measures

Figure 92: Key purchase measures for the top brands of baby wipes, by household penetration, 52 weeks ending June 24, 2012

## Appendix—Other Useful Consumer Tables

### Usage and purchase of disposable baby products

Figure 93: Household use of disposable baby products, by household income, August 2011-12

Figure 94: Baby products purchased in the past three months, by gender and age, February 2013

Figure 95: Baby products purchased in the past three months, by household income, February 2013

Figure 96: Baby products purchased in the past three months, by children age, February 2013

### Usage frequency

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 97: Frequency of use of disposable baby products, by individual ages of children in household, August 2011-12

## Brand usage

### Baby wash and bath products

Figure 98: Brands of baby wash and bath products used in the household, by gender, August 2011-12

Figure 99: Brands of baby wash and bath products used in the household, by household income, August 2011-12

Figure 100: Brands of baby wash and bath products used in the household, by individual ages of children in household, August 2011-12

### Baby wipes

Figure 101: Brands of premoistened wipes/cloths for babies used in the household, by gender, August 2011-12

Figure 102: Brands of premoistened wipes/cloths for babies used in the household, by household income, August 2011-12

Figure 103: Brands of premoistened wipes/cloths for babies used in the household, by individual ages of children in household, August 2011-12

### Baby oil and baby lotion

Figure 104: Brands of baby oil and baby lotion used in the household, by gender, August 2011-12

Figure 105: Brands of baby oil and baby lotion used in the household, by household income, August 2011-12

Figure 106: Brands of baby/children's shampoo used in the household, by individual ages of children in household, August 2011-12

### Baby/children's shampoo

Figure 107: Brands of baby/children's shampoo used in the household, by gender, August 2011-12

Figure 108: Brands of baby/children's shampoo used in the household, by household income, August 2011-12

Figure 109: Brands of baby/children's shampoo used in the household, by individual ages of children in household, August 2011-12

### Diapers and training pants

Figure 110: Brands of disposable diapers/training pants used in the household, by gender, August 2011-12

Figure 111: Brands of disposable diapers/training pants used in the household, by household income, August 2011-12

Figure 112: Brands of disposable diapers/training pants used in the household, by individual ages of children in household, August 2011-12

### Body and baby powder

Figure 113: Brands of body and baby powder used in the household, by gender, August 2011-12

Figure 114: Brands of body and baby powder used in the household, by household income, August 2011-12

### Baby personal care product claims

Figure 115: Claims influencing purchase of baby personal care products, by gender, February 2013

Figure 116: Claims influencing purchase of baby personal care products, by age, February 2013

Figure 117: Claims influencing purchase of baby personal care products, by household income, February 2013

### Diaper/training pants claims

Figure 118: Claims influencing purchase of diapers/training pants, by gender, February 2013

Figure 119: Claims influencing purchase of diapers/training pants, by household income, February 2013

### Diaper frustrations

Figure 120: Top diaper/training pants frustrations among parents, by gender, February 2013

Figure 121: Top diaper/training pants frustrations among parents, by age, February 2013

Figure 122: Top diaper/training pants frustrations among parents, by child age, February 2013

### Attitudes toward disposable baby products

Figure 123: Agreement of attitudes toward disposable baby products, by household income, February 2013

Figure 124: Agreement of attitudes toward disposable baby products, by children age, February 2013

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Disposable Baby Products - US - April 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Race and Hispanic origin

- Figure 125: Household use of disposable baby products, by race/Hispanic origin, August 2011-12
- Figure 126: Brands of premoistened wipes/cloths for babies used in the household, by race/Hispanic origin, August 2011-12
- Figure 127: Brands of baby oil and baby lotion used in the household, by race/Hispanic origin, August 2011-12
- Figure 128: Brands of baby/children's shampoo used in the household, by race/Hispanic origin, August 2011-12
- Figure 129: Brands of baby wash and bath products used in the household, by race/Hispanic origin, August 2011-12
- Figure 130: Brands of disposable diapers/training pants used in the household, by race/Hispanic origin, August 2011-12

## Appendix—Social Media

### Brand usage or awareness

- Figure 131: Brand usage or awareness, February 2013
- Figure 132: Huggies usage or awareness, by demographics, February 2013
- Figure 133: Pampers usage or awareness, by demographics, February 2013
- Figure 134: Luvs usage or awareness, by demographics, February 2013
- Figure 135: Seventh generation usage or awareness, by demographics, February 2013
- Figure 136: Johnson's baby usage or awareness, by demographics, February 2013
- Figure 137: Aveeno usage or awareness, by demographics, February 2013

### Activities done

- Figure 138: Activities done, February 2013
- Figure 139: Huggies – Activities done, by demographics, February 2013 (continued)
- Figure 140: Huggies – Activities done, by demographics, February 2013 (continued)
- Figure 141: Pampers – Activities done, by demographics, February 2013
- Figure 142: Pampers – Activities done, by demographics, February 2013 (continued)
- Figure 143: Luvs – Activities done, by demographics, February 2013
- Figure 144: Luvs – Activities done, by demographics, February 2013 (continued)
- Figure 145: Johnson's baby – Activities done, by demographics, February 2013
- Figure 146: Johnson's baby – Activities done, by demographics, February 2013 (continued)
- Figure 147: Aveeno – Activities done, by demographics, February 2013
- Figure 148: Aveeno – Activities done, by demographics, February 2013 (continued)

### Online conversations

- Figure 149: Percentage of consumer conversation by selected disposable baby products brands, February 19, 2013-March 18, 2013
- Figure 150: Online mentions, selected disposable baby products brands, by day, February 19, 2013-March 18, 2013
- Figure 151: Mentions by page type, selected disposable baby products brands, February 19, 2013-March 18, 2013
- Figure 152: Mentions by type of conversation, selected disposable baby products brands, February 19, 2013-March 18, 2013
- Figure 153: Major areas of discussion surrounding disposable baby products brands, by day, February 19, 2013-March 18, 2013
- Figure 154: Major areas of discussion surrounding disposable baby products brands, by page type, February 19, 2013-March 18, 2013

## Appendix—Trade Associations

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)