

Baby Diapers Online Scorecard

Online shopping provides time and money-saving opportunities that busy, cost-conscious parents are taking advantage of. As shoppers shift their spending away from physical stores, it is no surprise that Baby Products is a whopping \$4 billion industry online. Notably, the Baby Diaper subcategory grew 16% over the last year and e-tailers are now offering niche brands at affordable costs. Although Pampers and Huggies have long dominated the space, the trend towards natural products is changing the landscape of the category. In addition to the desire for chemical free, plant-based, and eco-friendly products, private label brands are taking off, giving e-tailers the opportunity to sell products with higher margins. With big changes taking place in the category, brands must keep up if they hope to defend their online market share.

This scorecard spotlights the top 15 diaper brand's performances online and delves into the strategies that brands used to attain their spot on this list. The Shopper Journey and Buyer Behavior components of this scorecard provide insight into pre-purchase and post-purchase metrics that help a brand better understand the behavior of their consumer.

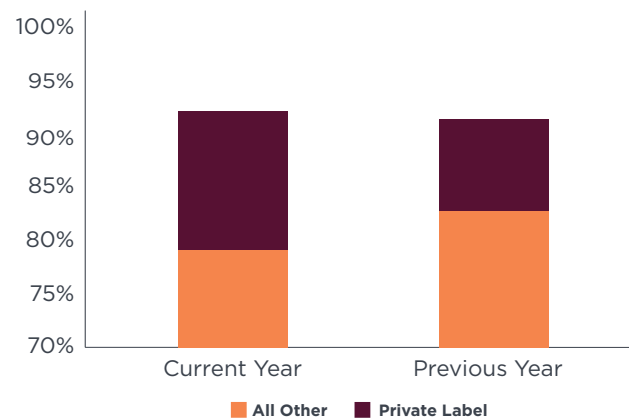
Diaper Brand	Market Benchmark		Shopper Journey			Buyer Behavior
	Sales Share	Dollar Spent Growth	Search Driven Conversion	Branded Search Conversion	Percent Winning Sessions	Share of Wallet
Pampers	35.7%	-5%	8	2	1	1
Huggies	29.2%	25%	9	8	2	2
Luvs	6.3%	49%	6	6	4	3
Up & Up	4.5%	77%	3	3	8	6
Parent's Choice 1	3.8%	105%	1	5	7	4
Seventh Generation	2.2%	10%	13	7	11	8
The Honest Company	2.2%	47%	7	4	9	7
Kirkland Signature	2.1%	10%	4	15	14	9
Mama Bear	1.5%	225%	10	14	10	13
Bambo Nature	1.1%	24%	12	11	3	12
Member's Mark	1.0%	57%	5	13	13	10
Alvababy	0.9%	40%	11	12	4	15
Andy Pandy	0.6%	38%	14	9	6	11
Babyganics	0.6%	-21%	2	1	3 15	5
Mama Koala	0.5%	2 372%	15	10	12	14
	Actuals		Ranked			
Analysis Timeframe: July 2018 - June 2019						

Trend Spotlight: Natural Diaper Products

Brands such as Andy Pandy, The Honest Company, and Babyganics on this list represent a change to the brand landscape as consumers are demanding natural, organic diapers from boutique brands that promote baby wellness. Common features among these products are the use of natural fibers, such as bamboo, biodegradability, and the absence of harsh chemicals like chlorine. As the result of these demands, Amazon created the Earth + Eden brand, while Walmart partnered with Kristen Bell to design Hello Bello, both with competitive price points. Name brands have also taken notice. Pampers recently released a plant-based product line called Pure.

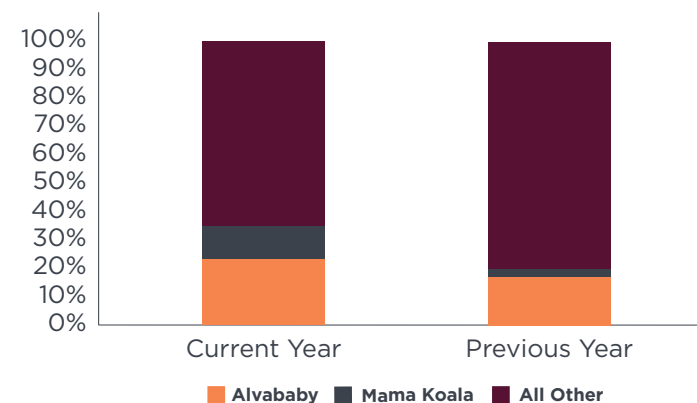


1 Private Label % Market Share



Private label diapers are on the rise, and each major retailer has at least one brand on this list. Retailers can freely promote their products on their website, all while offering the items at unbeatably low prices. Private label brands on the top 15 brand list grew at 72% year-over-year as opposed to non-private labels, which grew a mere 11% in the last year. Notably, Mama Bear, Amazon's private label, grew 225% year-over-year, which is partially driven by many of the top SKUs being offered through Amazon's subscription service that allows consumers to save on repeat purchases.

2 Cloth Diaper % Market Share



Although cloth diapers represent a small portion of the total baby diaper category, this subsegment has continued to grow over time. More specifically, the niche segment has grown at an average rate of 3% each year. Despite its relatively low growth rate, two brands have emerged as the to-beat-competitors. Our data shows that Mama Koala and Alvababy, with growth rates of 372% and 40% respectively, have stolen market share from the majority of other brands in the space. With an exceptionally high growth rate, the question is...will Mama Koala's emerge as the front runner for the cloth diaper market?

3 Winners and Losers

Losing Items	Price	Winning Items	Price
Babyganics Ultra Absorbant Size 3	\$58.42	Huggies Little Swimmers	\$12.31
Babyganics Diapers Club Pack	\$25.82	Bambo Nature Eco Friendly Diapers	\$11.49
Babyganics Ultra Absorbant Size 1	\$57.26	Earth + Eden Baby Diapers	\$45.26
Babyganics Ultra Absorbant Size 4	\$57.56	Seventh Generation Baby Diapers	\$47.90
Babyganics Ultra Absorbant Size 5	\$58.75	Mama Bear Diapers	\$33.99
Babyganics Ultra Absorbant Size 2	\$60.63	Earth's Best TenderCare Diapers	\$32.99

Babyganics, a natural disposable diaper brand, seems to be losing some momentum online and is one of just two top 15 brands to see year-over-year sales dollar declines. As the niche market for natural diapers grows, Babyganics' high prices may drive away potential new customers. The table above shows that the Babyganics products often lost to those at lower price points. It is, however, notable that Babyganics ranks well in terms of Share of Wallet. This suggests that while the brand may not be capturing new customers at the same voracious rate as others, they do have loyal customers who repeatedly buy the Babyganics brand.

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