

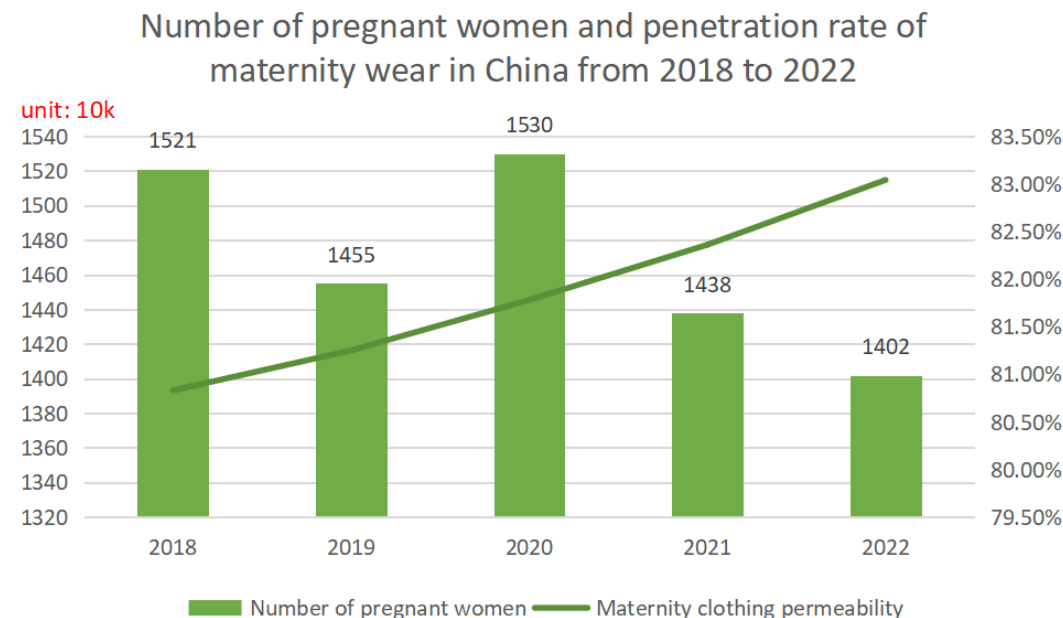


Market and online sales analysis of baby and mom industry (maternity wear)

Prepared by Jademond Digital
2023.10

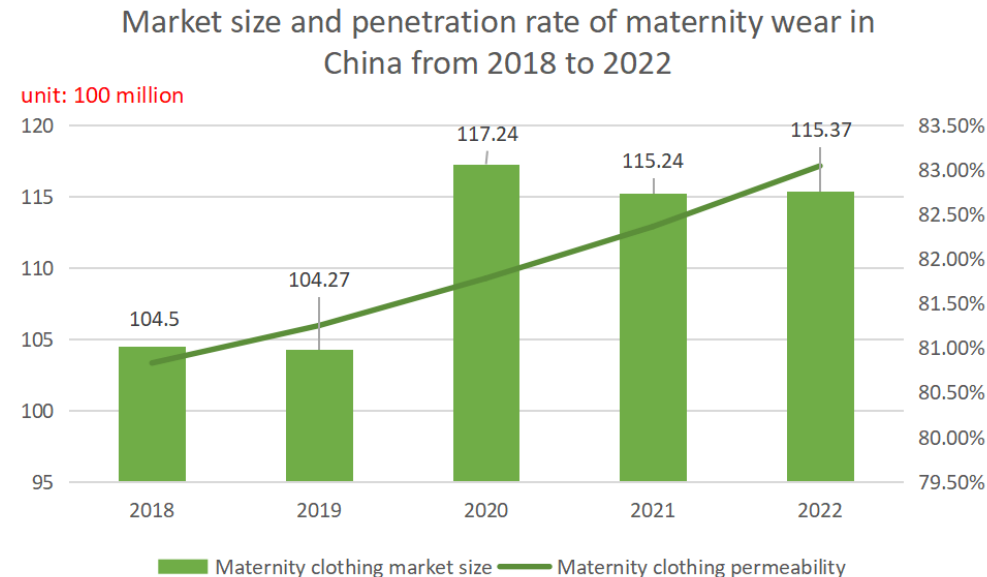
Analysis of maternity clothing industry in China (1)

- Due to the superposition of multiple factors, the current fertility intention in China continues to decline, making the number of pregnant women begin to show negative growth, but there is still some room for growth in the penetration rate of maternity wear. by 2022, the penetration rate of maternity wear reached 83.04%.
- Analysis of consumer market characteristics: The data show that 95% of the new generation of mother and child groups have university degrees, of which 11% have master's degrees or above; The average household income for mothers and children also rose 22% from 18,000 RMB last year to 22,000 RMB. In addition, the post-90s treasure father and mother became the main force of mother and child groups, accounting for nearly half.
- It can be seen that compared with the traditional mother and child groups, the cultural level and economic strength of the new generation of treasure mothers and fathers have been significantly improved. Therefore, they pay more attention to **the concept of eugenics and upbringing**, and their consumption behavior is more inclined to meet the dual needs of happiness and happiness and health and safety.



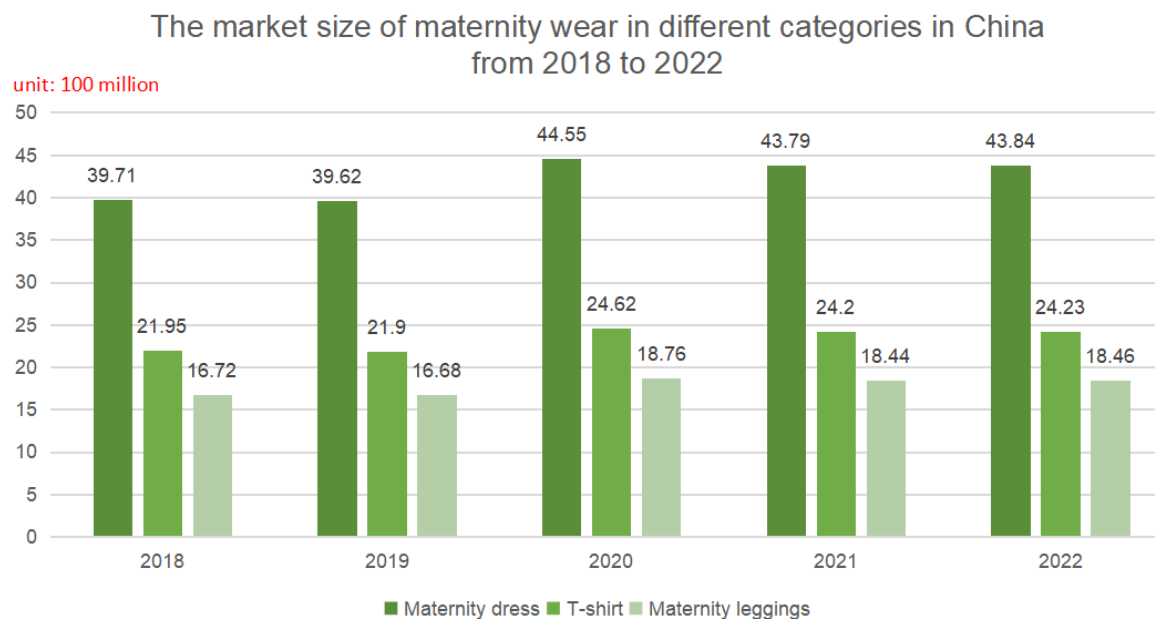
Analysis of maternity clothing industry in China (2)

- Maternity clothing refers to the clothing that a woman wears when she is pregnant. The choice of maternity clothing should be based on the premise of not interfering with the development of the fetus, with the principle of wide and comfortable, good permeability, strong sweat absorption, heat protection and easy to wear and take off, with **cotton** as the first choice, pay attention to practicality, can take into account breastfeeding.
- Current situation of industry market size: Subject to the aging of China's population, as well as the superposition of various factors, the number of pregnant women in China began to decline to a certain extent, and the scale of the maternity wear industry is also in g state of stagnation, and the market size of maternity wear in 2022 is about 11.537 billion RMB.



Analysis of maternity clothing industry in China (3)

- Dress category. the market attraction is strong; **French-oriented style** is the mainstream at the moment, at the same time, there is a high demand for functional extension (breastfeeding), comfort upgrade and self-pleasing scenes.
- T-shirt category, Feature **baggy**, long-sleeved, crew-neck sweatshirts and sleeveless shirts that look good and can still be worn after childbirth, but make sure the tops are wide and long.
- The leggings category. The leggings are the mainstream, and maternity **wide-leg pants** and **straight-leg pants** are the trend categories of sales growth, Diversification of styles and functions, fabric upgrades and large-size leggings are the main demands of the maternity leggings category market.



Analysis of maternity clothing industry in China (4)

- The report shows that 96% of maternal and infant groups will buy exclusive consumer goods in the pregnancy stage, pregnant women pay the same attention to the dress of pregnancy, many pregnant women hope that the clothes during pregnancy can also be fashionable and beautiful. ‘pleasing yourself’ consumption has become an industry trend, is expected to make the market size of the maternity wear industry expand.
- Demand preference: In the demand preference of pregnant women's clothing, the most important is comfort, followed by fabric and style, followed by function, price, color, and brand.
- Price preference: According to the survey, pregnant women can accept the price of maternity clothing is mainly concentrated between 100 and 400 RMB.
- Fabric preference: mainly focus on natural fabric, such as cotton, hemp and silk, of which cotton fabric preference accounts for 87% of the total. Comfort, sweat absorption and breathability are the core selling points.

Baby & Mum - Tmall quality store data list

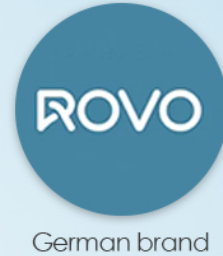
Brand	CN name	Tmall Website	Active time	Total Orders	Monthly Sales	Price Range	Best selling products
ROVO	/	https://rovo.tmall.com/	7 years	1,000,000+	5,000+	¥29 to ¥236	¥98 nursing bra
inujirushi	犬印本舗	https://inujirushimy.tmall.com/	9 years	400,000+	3,000+	¥18 to ¥1,878	¥269 Sports nursing bra
medela	美德乐	https://medela.tmall.com/	13 years	2,000,000+	10,000+	¥12 to ¥3,680	¥308 nursing bra
Kerr Mommy	/	https://kerrmommy.tmall.com/	4 years	2,000+	50+	¥56.5 to ¥1,629	¥319 nursing bra
cantaloop	/	https://cantaloopmy.tmall.com/	9 years	60,000+	600+	¥29.9 to ¥568	¥198 nursing bra
EMXEE	嫚熙	https://emxee.tmall.com/	9 years	10,000,000+	20,000+	¥7.9 to ¥509	¥129.9 nursing bra
Fisher Price	费雪	https://fisherpriceailu.tmall.com/	3 years	200,000+	7,000+	¥39 to ¥259	¥199 Maternity dress
SELYNEAR	/	https://selynear.tmall.com/	6 years	100,000+	2,000+	¥79 to ¥949	¥399 Maternity dress
JOYNCLEON	婧麒	https://joyncleon.tmall.com/	12 years	10,000,000+	15,000+	¥4.8 to ¥1,249	¥260 radiation-proof clothes
HaloVa	/	https://halova.tmall.hk/	4 years	400,000+	8,000+	¥10 to ¥419	¥168 mummy bag

The data is up to August 2023.

Baby & Mum – Characteristics of Tmall Quality Brand

► ROVO (German brand)

- Total sales order: 1,000,000+
- Price range: ¥29 to ¥236
- Best selling products: ¥98/nursing bra
- Originated in 1993 in Heubach, Germany.
- Entered China in 2006, all products passed the certification of China Testing Center in 2007, and began to be marketed;
- In 2009, the first Asian body type of comfortable breastfeeding underwear;
- Best-selling nursing bra highlights:
 - ◆ a. Feeding button, one button release. wireless bra.
 - ◆ b. Fabric composition: Spandex 69.7% nylon 30.3%. Lining composition: Modal 77.7% Spandex 16.7% Mulberry silk 5.6%. lining material: nylon 66.2% spandex 33.8%.
 - ◆ c. Noninductive wrap, side breast retraction.
 - ◆ d. 3D three-dimensional cup, the upper support gathers, anti-sag design.



Baby & Mum – Characteristics of Tmall Quality Brand

► inujirushi (Japanese brand, "made in china")

- Total sales order: 400,000+
- Price range: ¥18 to ¥1,878
- Best selling products: ¥98/nursing bra
- Originated in 1902, Japan's centennial pregnancy product brand. Royal choice.
- Japanese brand, processed in China.
- Best-selling sports Nursing bra highlights:
 - ◆ a. Korean Technology Creora spandex, zero pressure, no marks, deodorization.
 - ◆ b. Fabric composition: nylon 65%, spandex 35%.



Japanese brand, "made in china"

B:瑜伽Bra

哺乳瑜伽
一件切换

高弹透气
畅享瑜伽 🧘



5色可选

Baby & Mum – Characteristics of Tmall Quality Brand

► meleda (Swiss brand)

- Total sales order: 4,000,000+
- Price range: ¥12 to ¥3,680
- Best selling products: ¥308/nursing bra
- Originated in Switzerland in 1961. It entered China in 2007.
- The company has production sites in Switzerland and the United States, as well as 18 subsidiaries in Europe, North America and Asia, including China.
- A global marketing network covering more than 100 countries.
- Best-selling nursing bra highlights:
 - ◆ a. Cool and comfortable, designed for pregnant and nursing mothers.
 - ◆ b. Quick drying technology fabric. Adaptive stretch fabric.
 - ◆ c. International environmental textile Association certification standards.
 - ◆ d. Fabric composition 92% nylon/polyamide fiber 8% spandex/polyurethane elastic elastic fiber.



Baby & Mum – Characteristics of Tmall Quality Brand

► Kerr Mommy (Italian brand)

- Total sales order: 2,000+
- Price range: ¥56.9 to ¥1,629
- Best selling products: ¥319/nursing bra
- European textile OEKO-TEX eco-certification
- European level safety certification
- Made by Santoni loom in Italy
- Best-selling nursing bra highlights:
 - ◆ a. Detachable pneumothorax pad.
 - ◆ b. Single hand release button, more convenient breastfeeding.
 - ◆ c. U-shaped back design, reduce shoulder pressure.
 - ◆ d. Italian seamless weaving process.
 - ◆ e. Fabric composition: 92% nylon, 8% spandex.



Baby & Mum – Characteristics of Tmall Quality Brand

► cantaloop (Danish brand)

- Total sales order: 60,000+
- Price range: ¥29.9 to ¥568
- Best selling products: ¥198/nursing bra
- Originated in Denmark in 1971. It is a brand of TYTEX A/S, focusing on the maternity underwear industry.
- European standard OEKO-TEX certification. European local production.
- Several provinces in China have offline experience stores.
- Best-selling nursing bra highlights:
 - ◆ a. European Gold Award for lactation products.
 - ◆ b. Patented drop-cup round breastfeeding button.
 - ◆ c. Fabric composition: 91% polyamide fiber, 9% elastic fiber.



Danish brand

cantaloop 
Maternity intimate wear

Drop-cup 专利哺乳扣
避免刮伤宝宝肌肤

专利号
2020304325390



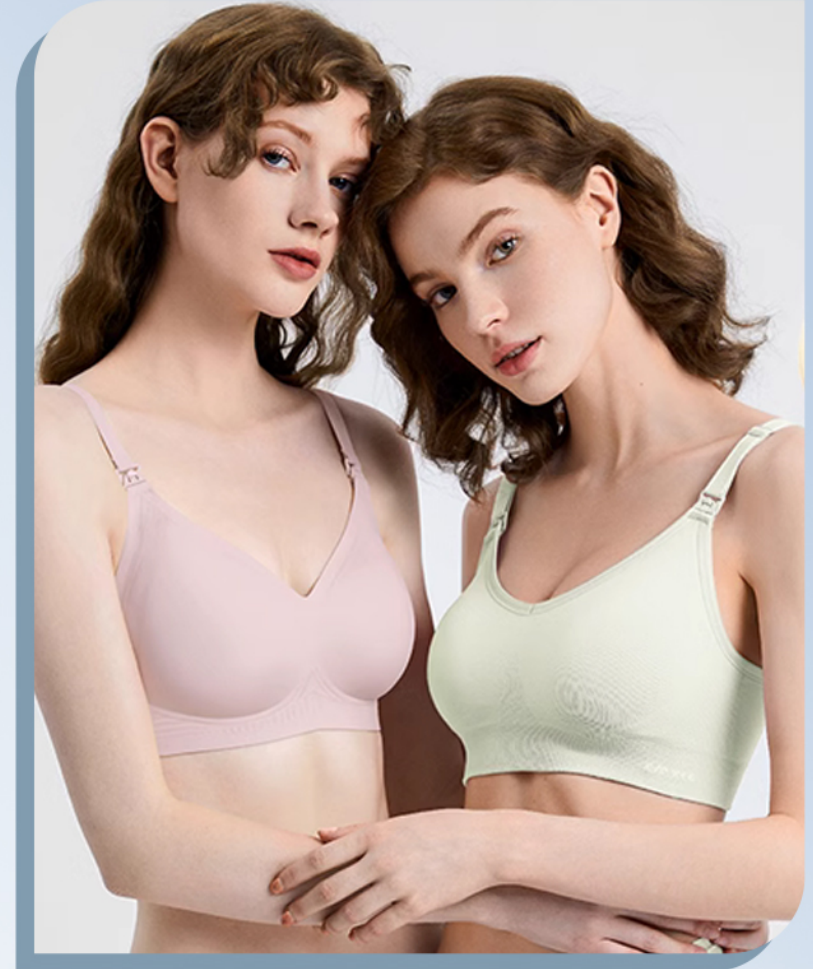
Baby & Mum – Characteristics of Tmall Quality Brand

► EMXEE (British brand, "made in china")

- Total sales order: 10,000,000+
- Price range: ¥7.9 to ¥509
- Best selling products: ¥129.9/nursing bra
- Eu Level I standard, Oeko-Tex standard certification.
- For six consecutive years, it has been the best-selling nursing bra on Tmall and Taobao platforms.
- The total number of nursing bras sold exceeded 9.85 million.
- Best-selling nursing bra highlights:
 - ◆ a. American Lycra elastic fiber.
 - ◆ b. Israeli super fine denier, soft and delicate.
 - ◆ c. Italian Santoni seamless weaving.
 - ◆ d. Anti-gravity, prevent sagging.



British brand, "made in china"



Baby & Mum – Characteristics of Tmall Quality Brand

► fisher price (American brand, “made in china”)

- Total sales order: 200,000+
- Price range: ¥39 to ¥259
- Best selling products: ¥199/Maternity dress
- Originated in 1930, A brand owned by Mattel.
- The global annual sales of of \$2 billion, the USA market share of 36%.
- CAL and ISO9001 certification, International Laboratory accreditation Cooperation organization, China accreditation international mutual recognition testing.
- Best-selling maternity dress highlights:
 - ◆ a. 100% cotton, Egyptian cotton GIZA 45, fiber length 6-7 cm. Known as the "Queen's cotton".
 - ◆ b. Adjustable abdominal circumference, can be worn during pregnancy and postpartum.
 - ◆ c. German Dukep sewing machine, uniform line.



American brand, “made in china”



Baby & Mum – Characteristics of Tmall Quality Brand

► SELLYNEAR (Chinese brand)

- Total sales order: 100,000+
- Price range: ¥79 to ¥949
- Best selling products: ¥399/maternity dress
- Shanghai Yunshang Clothing Co., Ltd. was founded, the general manager is Wu Xiaoyun (Winnie).
- Pregnancy wear brands reported by magazines such as ELLE, Harper's Bazaar and VOGUE.
- Brand friends: London Ballet principal dancers Lauren Cuthbertson, Zhang Ziyi (章子怡, Chinese actress), Li Ai (李艾, Chinese host), etc



Chinese brand



Baby & Mum – Characteristics of Tmall Quality Brand

► JOYNCLEON (Italian brand, "made in china")

- Total sales order: 10,000,000+
- Price range: ¥4.8 to ¥1,249
- Best selling products: ¥260/radiation-proof clothes
- Originated in Italy in 2004. Entered China in 2011 and opened Tmall store.
- For 8 consecutive years, the sales of radiation protective clothing were the highest in the whole network.
- Anti-radiation clothing Tmall accumulated orders of 1.28 million +.
- Best-selling radiation-proof clothes highlights:
 - ◆ a. 30% metal content, SGS Swiss standard.
 - ◆ b. The shielding rate is as high as 99.99%.
 - ◆ c. 360 degree radiation protection.
 - ◆ d. Fabric composition: 30% refined cotton, 30% metal fiber, 22% Modal, 18% polyester fiber.



Italian brand,
"made in china"



Baby & Mum – Characteristics of Tmall Quality Brand

► Halova(American brand)

- Total sales order: 400,000+
- Price range: ¥10 to ¥419
- Best selling products: ¥168/Mummy Bag
- It originated in Colorado, USA in 2008.
- 15 years North American maternal brand, 2 years warranty, free replacement.
- Implementation of the Washington 2021 Infant and Child Safety Standards.
- Best-selling mummy bag highlights:
 - ◆ a. 24L Large capacity, independent partition.
 - ◆ b. Widen the EVA harness so that it is not easily fatigued.
 - ◆ c. Made in the USA, high density DuPont fabric.
 - ◆ d. Partnered with green materials company Takiho to use biodegradable recycled fiber fabrics.



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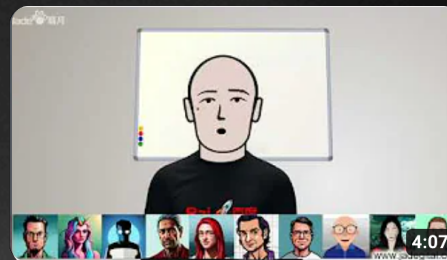
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