

**China Disposable Diaper Industry
Report, 2012-2013**

Feb. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

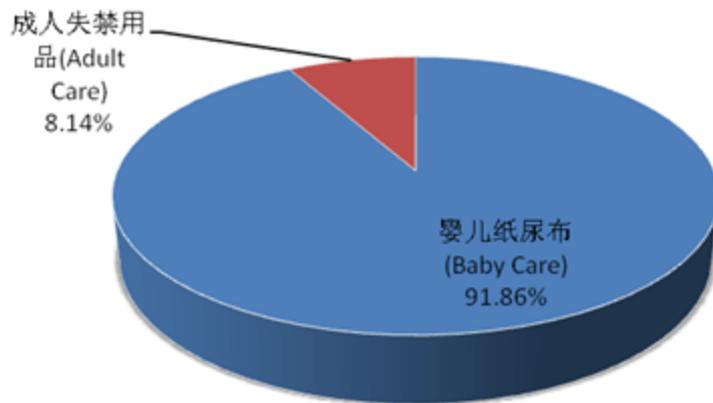
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

According to consumer groups, disposable diapers are divided into baby disposable diapers and adult incontinence supplies. In 2011, Chinese disposable diaper market size reached RMB20.096 billion, including RMB18.46 billion from baby disposable diapers (up 27.7% year-on-year) and RMB1.636 billion from adult incontinence supplies (up 33.9% year-on-year).

Chinese Disposable Diaper Market Structure, 2011



Source: Household Paper Committee of China Paper Industry Association
 RIC: China Disposable Diaper Industry Report, 2012-2013

In recent years, the baby disposable diaper industry of China has developed rapidly, but the market penetration rate is still much lower than that in developed countries; in 2011, China's market penetration rate was just 40%. With the growth of per capita disposable income and the fourth baby boom (2010-2015), Chinese baby disposable diaper market will embrace a broad development space.

In 2011, top four manufacturers Procter & Gamble (17.4%), Hengan, Unicharm and Chiaus contributed 55% to the total sales volume of baby disposable diapers together.

It is worth noting that the market ranking of Hengan which targets medium and low-end market fell from the first to the second in 2011. In recent years, the growth rate of Hengan's disposable diaper revenue has slowed down. In H1 2012, Hengan's disposable diaper revenue amounted to HKD1.321 billion, representing a year-on-year increase of 7.3% (the annual growth rate was 12.28% in 2011). In 2011, Chiaus showed eye-catching performance, and its revenue increased by 10.2%, and surpassed Kimberly-Clark to take the fourth place from the fifth position in 2010.

Currently, Chinese adult incontinence supplies market is in the early stage of development, with the market penetration rate of 3% in 2011. The entire industry is developing rapidly. According to the statistics of Household Paper Committee of China Paper Industry Association, there were 297 adult incontinence supplies manufacturers in 2011, up 100 from 2010. Compared with the baby disposable diaper market, the adult incontinence supplies market has low concentration degree, dispersed production and marketing, without a brand pattern. In 2011, top three players included Zhenqi, Coco and Haoyue.

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