



**China Disposable Diaper Industry Report,
2016-2020**

Jun. 2016

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 different user groups, disposable diapers can be divided into baby diapers and adult incontinence products

1. Baby Diapers

In 2015, the size of global baby diaper market reached around USD54.3 billion; the main consumption areas including Asia, North America and Western Europe accounted for more than 70% of consumption. Baby diapers have seen wide application and a market penetration rate of 90% or so in North America, Western Europe, Japan and other developed countries, in contrast to less than 60% in the Chinese market, which shows the huge potential for development.

In 2015, the Chinese baby diaper market reported consumption of 27.4 billion pieces and size of about RMB29.5 billion. In the next five years, with the improvement of China's urbanization rate and per capita disposable income as well as the opening of "two-child policy", the size of baby diaper market is expected to maintain an over 10% growth rate to hit roughly RMB51 billion by 2020.

In China, imported diapers have occupied about 50% of baby diaper market share, even an absolutely advantageous share of 80% in high-end baby diaper market. In 2015, key players in the Chinese baby diaper market were P&G, Unicharm, Kimberly-Clark, Hengan International and Kao, which had a combined market share of 70%. Among them, P&G topped the list with 29% market share.

2. Adult Incontinence Products

Japan boasts the highest market penetration rate of adult incontinence products in the world, up to 80%; followed by North America (65%) and Western Europe (58%), in contrast to the world's average level of 12%. However, in China, the rate is merely 3%, showing great potential for growth.

The Chinese adult incontinence product market is still in the early stage of development with market size of RMB5.36 billion in 2015. Following the acceleration of social aging, the Chinese adult incontinence product market size is expected to grow at a rate of 25% or so over the next five years.

In 2015, there were about 300 adult incontinence product manufacturers in China, mainly including Hangzhou Zhen Qi Health Products Co. Ltd., Hangzhou Haoyue Industry Co., Ltd., Hangzhou Coco Healthcare Products Co., Ltd., etc. with major brands "Sunkiss", "White Cross" and "Coco".

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Chinese Baby Diaper Market Size, 2009-2015



Source: Directory of Tissue Paper & Disposable Products (China), ResearchInChina

China Disposable Diaper Industry Report, 2016-2020 mainly highlights:

- Market size, demand, etc. of global baby diapers and adult incontinence products;
- Market size, production and marketing, competition pattern, development forecast, etc. of Chinese baby diapers and adult incontinence products;
- Operation, disposable diapers, prediction and forecast, etc. of 23 players at home and abroad.

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