

# Nappies/Diapers/Pants in Asia Pacific

May 2021

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Scope

Key findings

## REGIONAL OVERVIEW

Asia Pacific continues to account for more than a third of global sales

Strong rebound expected in 2021

China drives growth in the 2015-2020 period

Disposable pants dominate new sales in 2015-2020

Standard nappies/diapers struggling in recent years

Most consumers continue buying nappies/diapers in 2020

Further strong growth for leading channel e-commerce in 2020

Store-based retailers continue losing share during the pandemic

## LEADING COMPANIES AND BRANDS

Declining concentration in the Chinese market

Kao Corp continues losing share in 2020

China the main market for the top 10 players

Bobby continues moving up the regional rankings

## FORECAST PROJECTIONS

Indonesia will be the most dynamic market over 2020-2025

Disposable pants will account for most of the new forecast period sales

Rising incomes and expanding populations should help drive growth

## COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

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India: Competitive and Retail Landscape

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Vietnam: Market Context

Vietnam: Competitive and Retail Landscape

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