Wipes

September 2011

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WIPES IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, wipes retail value sales grow by 7% to reach Bt454 million
- Greater product penetration is witnessed among primary and secondary target audience
- Only personal wipes have significant sales in Thailand
- Average unit prices declines to Bt2.5 per unit in 2010
- Better Way (Thailand) Co Ltd leads wipes with a 17% share
- Wipes constant value sales are expected to grow at a CAGR of 5% to reach Bt573 million by 2015

TRENDS

- The importance of health and hygiene is growing within consumers' consciousness, a trend that contributed to the positive performance of many categories within tissue and hygiene, including wipes. The usage of wipes was apparent among existing customers as well as new consumers. Even though the category is not dynamic, demand is gradually increasing, supported by greater product availability throughout modern and traditional retail channels as manufacturers focused on distribution network expansion.
- Compared to the CAGR of the review period, the 7% value growth registered in 2010 represented a slowdown as products within the wipes category are considered non-essential and consumers tend to cut them from their expenditure.
- The consumption of wipes remained largely concentrated within urban areas where consumers are more educated and prone to use wipes in their daily life. Furthermore, consumers in urban areas have stronger awareness of wipes and also are better able to afford wipes.
- The baby wipes category saw the fastest value growth in 2010 at 12%. General purpose wipes showed little dynamism in terms of new product launches and marketing strategies, while facial cleansing wipes showed the weakest growth as female consumers increasingly perceived this product type to be less effective than facial cleansers and toners.
- The greater penetration of baby wipes among modern parents is contributing to increasing sales for this product type. Thai parents are interested in using baby wipes since the product offers convenience, flexibility and an easy way to clean their baby. Thai parents are not overly price sensitive and are willing to pay for products that provide care for their babies, a factor that has resulted in the category recording the strongest growth within wipes throughout the review period. During this time, consumption was heavily concentrated within urban areas, although by 2010, many consumers were becoming more familiar with the use of this product type and demand was expanding towards provincial areas.
- The unit price portrayed a decreasing trend in 2010. Strong competition is forcing manufacturers to offer more promotions and discounting in order to maintain their consumer base and volume sales.

- As consumer lifestyles become increasingly modern and busy, the use of personal wipes was has increased among Thai consumers. The growing awareness of the need for hygiene is supporting growth since personal wipes are perceived as a convenient option for cleaning purposes, especially outside the home. The key purchasers of this product type remained women, especially working and urban women. There is considerable product variety available in the marketplace, with several patterns, pack sizes and brands offered to serve demand for different groups.
- There remained no significant presence for home care wipes in Thailand in 2010. Even though tissue and hygiene products have been present in Thailand for a long time, home care wipes remained out of favour with Thai consumers, perceiving this product type to be non-essential and preferring the traditional cleaning option of reusable cotton cloths. In terms of product accessibility, home care wipes continued to have limited availability, being predominantly in urban areas, while availability in rural areas remained negligible.

COMPETITIVE LANDSCAPE

- Better Way (Thailand) Co Ltd remained the leader in wipes, largely due to its strong position in facial cleansing wipes. The company held a value share of 17% within wipes as a whole in 2010. Better Way (Thailand) is among the top players active in direct selling of beauty and personal care. The company's products are affordable and well known among Thai consumers due to its extensive direct selling network. However, Better Way (Thailand) has been losing share since 2007. This due to the declining share of facial cleansing wipes as some female consumers are switching to baby wipes for their facial cleansing needs as they think such products are safe for their face as they can be used on a baby's skin.

PROSPECTS

- Over the forecast period, the wipes category is expected to be remain positive but see a gradual slowdown in growth year on year. Volume sales of wipes are expected to be slower as the category approaches maturity among the main consumers in urban centres. However, baby wipes will contribute the strongest growth rate, supported by their expansion into rural areas, targeting higher-income parents.

CATEGORY DATA

Table 1 Retail Sales of Wipes by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Household Care Wipes and Floor Cleaning Systems						
- Dry Electro-Static Wipes						
- Floor Cleaning Systems						
- Impregnated Wet Wipes						
- Starter Kits/Sweepers/ Sticks (Excluding Wipes)						
- Wipes (Excluding Starter Kits/Sweepers/ Sticks)						
Personal Wipes						
- General Purpose Wipes						
- Intimate Wipes						
- Baby Wipes						
- Cosmetic Wipes						
Wipes						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Retail Sales of Wipes by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Household Care Wipes and Floor Cleaning Systems			
- Dry Electro-Static Wipes			
- Floor Cleaning Systems			
- Impregnated Wet Wipes			
- Starter Kits/Sweepers/Sticks (Excluding Wipes)			
- Wipes (Excluding Starter Kits/ Sweepers/Sticks)			
Personal Wipes			
- General Purpose Wipes			
- Intimate Wipes			
- Baby Wipes			
- Cosmetic Wipes			
Wipes			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Wipes Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Wipes Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Retail Sales of Wipes by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Household Care Wipes and Floor Cleaning Systems						
- Dry Electro-Static Wipes						
- Floor Cleaning Systems						
- Impregnated Wet Wipes						
- Starter Kits/Sweepers/ Sticks (Excluding Wipes)						
- Wipes (Excluding Starter Kits/Sweepers/ Sticks)						
Personal Wipes						
- General Purpose Wipes						
- Intimate Wipes						
- Baby Wipes						
- Cosmetic Wipes						
Wipes						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 6 Forecast Retail Sales of Wipes by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Household Care Wipes and Floor Cleaning Systems		
- Dry Electro-Static Wipes		
- Floor Cleaning Systems		
- Impregnated Wet Wipes		
- Starter Kits/Sweepers/Sticks (Excluding Wipes)		
- Wipes (Excluding Starter Kits/Sweepers/Sticks)		
Personal Wipes		
- General Purpose Wipes		
- Intimate Wipes		
- Baby Wipes		
- Cosmetic Wipes		
Wipes		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

WIPES IN THAILAND - COMPANY PROFILES

DSG INTERNATIONAL (THAILAND) PLC IN TISSUE AND HYGIENE (THAILAND)

strategic Direction

~ DSG International (Thailand) PLC is aiming to maintain its strong position in nappies/diapers/pants and incontinence as well as increase its share in these categories. The company is focusing on new product development in order to introduce products to suit a specific target audience. Innovation is l kely to incorporate new features and added value. In addition, the company will seek to achieve a more widespread distribution network and effective production cost management. The company is also looking towards strategic alliances in a bid to expand.

Key Facts

Summary 1 DSG International (Thailand) PLC: Key Facts

Full name of company:	DSG International (Thailand) PLC
Address:	4481-11 Soi Ladphao 53, Ladphao Road, Ladphao, Bangkok 10230, Thailand
Tel:	+6629332921
Fax:	+66 2933 2888
www:	http://asia.dsgil.comlmain.php
Activities:	Manufacturer and distributor of nappies/diapers/pants and incontinence products

Source: EuromonltorIntemational from company reports, company research, trade press, trade sources

Summary 2 DSG International (Thailand) PLC: Operational Indicators

	2008	2009	2010
Net sales	B12,903.3 million	Bt3,436.8 million	Bt4,367.2 million
Net profit	Bt387.1 million	6t351.3 million	B1265.7 millfon
Number of employees	400	424	401

Source: EuromonitorIntemational from DSG Intemational (Thailand) PLC annual reports, company research, trade press, trade sources

Company Background

- DSG International Thailand Co Ltd was established in 1994. It is the subsidiary of DSG International Ltd to produce and manage the distribution of nappies/diapers/pants and incontinence products of the company in South East Asia.
- In 2004, in terms of strategic alliances, DSG International (Thailand) Ltd wholly owned Disposable Soft Goods (Malaysia) Sdn Bhd (DSGML), DSG (Malaysia) Sdn Bhd (DSGMB), Disposable Soft Goods Pte Ltd (DSGS), Advanced Medical Supply Co Ltd (AMS) and approximately 60% of PT DSG Surya MAS Indonesia (PTDSG). DSG International (Thailand) Co Ltd became a publicly listed company in the same year.
- In 2010, DSG International (Thailand) PLC acquired 51% of Advanced Medical Supply Co Ltd and consolidated its sales and distribution activities under one company.
- The core business of DSG International (Thailand) is to market and distribute nappies/diapers/pants and incontinence products. In nappies/diapers/pants, the company owns the Fitti, Baby Love, Baby Love Play Pant, and Fitti Basic brands while, in incontinence products, the company owns Dispo 123 and Certainty. In addition, the company also offers a line of bed cover/protectors under the Softex brand.
- DSG International (Thailand) had a wide geographical coverage of sales in both nappies/diapers/pants and incontinence products; it enjoys high value shares in both categories, supported by robust growth rates. According to trade sources, the company tended to concentrate more on incontinence products than nappies/diapers/pants, with the purpose of aggressively strengthening brand awareness as well as generating sales with forceful marketing policies over the forecast period.
- A recent product introduction by DSG International (Thailand) was Baby Love Play Pants. This innovative product was launched in Thailand before other Asian countries as the company saw room for growth and favourable conditions in the marketplace. The product just received a warm welcome from Thai consumers and the company was satisfied with this product's performance.

Production

- DSG International (Thailand) owns local production facilities that enable it to supply its products in Thailand. Nonetheless, the company had to import approximately 90% of its raw materials from other countries in Southeast Asia for both its nappies/diapers/pants and incontinence products. Its factory is located at SIL Industrial Land in Saraburi province.
- The finished goods of DSG International (Thailand) are not only distributed domestically, they are also exported to neighbouring countries. DSG International (Thailand) PLC is the regional headquarters of the DSG International Ltd, which operates manufacturing facilities in Thailand, Malaysia and Indonesia. DSG International Ltd's businesses are concentrated in Thailand and Malaysia, although the company also has a presence in Singapore and Indonesia. Sales by location were 45% for Thailand, 40% for Malaysia, Indonesia and Singapore, with the remaining 15% for other countries.
- Apart from nappies/diapers/pants and incontinence products, DSG International (Thailand) does not have any manufacturing capacity in other markets. In terms of its focus and revenue breakdown, 80% of sales were derived from nappies/diapers/pants, while 20% was from incontinence products.
- DSG International (Thailand) utilises its production capacity to manufacture its own products, using its Thai factory for production in order to achieve effective cost and production management. The company does not offer OEM services to third parties, nor does it produce under licence or for private label.

Competitive Positioning

~ DSG International (Thailand) PLC was ranked third in retail tissue and hygiene with a value share of 10% in 2010. Thanks to its long presence in the country as well as strong brand awareness among consumers, the company was able to maintain its competitive position. The company offers different segmentation of premium, standard and economy brands in order to cater to the needs of different consumers.

~ Thanks to aggressive marketing strategies, the share of DSG International (Thailand) PLC increased over the review period. According to trade sources, the company is confident in its push to further penetrate the Thai market, which still offers room for growth over the forecast period. Both nappies/diapers/pants and incontinence products are considered to be "sunrise" industries in Asia, thus a continued positive performance is anticipated.

~ The nappies/diapers/pants and incontinence categories are areas of strong potential future growth, thus DSG International (Thailand) PLC is considered to be tapping into the fast-growing or emerging categories. Over the forecast period, nappies/diapers/pants and incontinence products are likely to see greater product penetration, alongside double-digit constant value growth.

~ The company is responding to consumer demand in different tiers and has a wide product portfolio within the key categories in which it is present. For example, in nappies/diapers/pants, it offers Fitti brand variants for the premium segment, Baby Love and Baby Love Play Pant for the standard segment and Fitti Basic for the economy segment. Meanwhile, in the incontinence category, it offers the premium Dispo 123 and the standard Certainty brands. As a result, DSG International (Thailand) is considered to position its products overall in the mid- to high-end segment.

~ DSG International (Thailand) is expected to engage in research and development focused on product innovation in order to respond to the increasingly sophisticated demands of consumers of nappies/diapers/pants and incontinence products. The company is expected to launch new products with new features and value-added specifications.

Summary 3 DSG International (Thailand) PLC: Competitive Position 2010

Product type	% Value Share	Rank
Retail Tissue and Hygiene	10.1%	3
Incontinence	57.8%	
Nappies/Diapers/Pants	16.6%	2

Source: EuromonitorInternationalfrom company reports, company researcn, trade press, trade sources, trade interviews

MOONG PATIANA INTERNATIONAL PLC IN TISSUE AND HYGIENE (THAILAND)

Strategic Direction

Key Facts

Summary 4 Moong Pattana Intemational Pic: Key Facts

Full name of company:	Moong Pattana International Pic
Address:	700/103 Moo 1, Amata Nakorn Industrial Park, Pan Thong, Chonburi, 20160, Thailand
Tel:	+66 3821 4343
Fax:	+66 3821 4776
WWJV:	WWJV.moongpattana.com/pi_geon.php
Activities:	Manufacturer and distr butor of baby wipes

Source: EuromonitorInternationalfrom companyreports, companyresearch,trade press,trade sources

Summary 5 Moong Pattana International Pic: Operational Indicators

	2007	2008	2009
Net sales	Removed	Removed	Removed
Net profit	Removed	Removed	Removed

Source: EuromonitorInternationalfrom companyreports, companyresearch,trade press, trade sources
Note: Net sales *and* profitshown were derived from Mom and Baby Care products

Company Background

~ Moong Pattana International Pic's core business is focused on products for the care of both mothers and babies with a licence to manufacture and distribute from Japan under the Pigeon brand. The company is focused on products for infants aged 0-3 years, with its offer including milk bottles, toddler feeders, breast pads and baby wipes. In addition, the company still has other product lines in kitchenware and home care, such as water spray bottle under the Foggy brand and stainless steel knives under the Gerlach brand.

Production

Competitive Positioning

Summary 6 Moong Pattana International Pic: Competitive Position 2010

Product type	% Value Share	Rank
Retail Tissue and Hygiene	Removed	Removed
Wipes	Removed	Removed
Baby Wipes	Removed	Removed

Source: Euromonitor International from company reports, company research, trade press, trade sources, trade interviews

TISSUE AND HYGIENE IN THAILAND - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Promising Positive Performance Registered

Thanks to a strong push by existing manufacturers, tissue and hygiene showed positive movement in 2010. While branded products were playing an important role and remained in control, there was an increased presence of private label in some areas. Such private label brands could draw consumer attention, especially among those who are increasingly price sensitive or who have limited purchasing power. Existing players thus need to create additional value and product differentiation in order to maintain competitiveness in the marketplace.

More Product Variety To Reflect Sophisticated Demand of Thai Consumers

With the commodity perception of tissue and hygiene products among Thai consumers, greater product variety was presented by manufacturers with the purpose of highlighting aspects of product differentiation. Consequently, this led to a wider product portfolio. At the same time, it better supported the sophisticated demands of consumers. Players, however, still faced testing circumstances. While more product variety was introduced, downward price pressure was caused by the presence of private label. Nonetheless, room for growth was still foreseen and many existing players attempted to exploit new opportunities.

International Players Take Control, Influencing Industry Movements

International players dominated the battlefield in tissue and hygiene. While international players remained active, their vigour left domestic players some distance behind as challengers. Thanks to advantages in many aspects of financial resources, distribution networks, technological knowhow and human resources, international players continued to fare well against competing manufacturers in the marketplace. Moreover, there were certain specific categories, such as sanitary protection, where domestic players' performance was very weak.

Strong Access Points for Distribution Networks Played An Important Role

In tissue and hygiene, brand loyalty is comparatively low compared with other consumer goods, since the products are normally perceived to be commodities with no obvious differentiation among brands.

Distribution channels play an important role. To achieve greater product accessibility for the target audience, distribution networks, supply chains and depot location were the focus of manufacturers' efforts. Additionally, to be ahead of the game in this environment, exclusive distribution channels were employed and strengthened, despite the fact that this would require high levels of investment.

Better Performance Expected for Tissue and Hygiene

A positive performance is expected to for tissue and hygiene into the forecast period. The increasing trend of health and hygiene consciousness is expected to fuel consumption and latent demand among consumers is likely to be ignited. As branding becomes more important as consumer confidence grows, brand loyalty is likely to be strengthened. Since consumers find it hard to differentiate between brands in some categories, brand building is expected to play an important role in maintaining the customer base. Brand building will thus drive long-term development and sustainability over the forecast period.

KEY TRENDS AND DEVELOPMENTS

Improvements in Distribution and Exclusive Channels Offer An Advantage

Current Impact

Outlook

Future Impact

Focus on Brand Strengthening for Tissue and Hygiene

Current Impact

Outlook

Future Impact

Manufacturers Focus on Cost Management To Gain A Competitive Advantage

Current Impact

Outlook

Future Impact

Innovation Alongside Continuous Advertising and Promotional Support

Current Impact

Outlook

Future Impact

Strong Penetration of Private Label Due To Low Brand Loyalty in Specific Areas

Current Impact

Outlook

Future Impact

MARKET INDICATORS

Table 1 Birth Rates 2005-2010

per '000 inhabitants

	2005	2006	2007	2008	2009	2010
Birth rates						

Source: Euromonitor International from official statistics

Table 2 Infant Population 2005-2010

'000

	2005	2006	2007	2008	2009	2010
0-4 yrs female						
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 3 Female Population by Age 2005-2010

'000

	2005	2006	2007	2008	2009	2010
Female population:						

January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						
Total Females 10-54						
Females 10-54 AS % OF total population	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Source: Euromonitor International from official statistics

Table 4 Total Population by Age 2005-2010

'000

	2005	2006	2007	2008	2009	2010
Population at January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 5 Households 2005-2010

	2005	2006	2007	2008	2009	2010
Households ('000)						
Average number of occupants per household (number)						

Source: Euromonitor International from official statistics

Table 6 Forecast Infant Population 2010-2015

'000

	2010	2011	2012	2013	2014	2015
0-4 yrs female						
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 7 Forecast Female Population by Age 2010-2015

'000

	2010	2011	2012	2013	2014	2015
Female population: January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						
Total Females 10-54						
Females 10-54 AS % OF total population						

Source: Euromonitor International from official statistics

Table 8 Forecast Total Population by Age 2010-2015

'000

	2010	2011	2012	2013	2014	2015
Population at January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						

40-44 yrs
45-49 yrs
50-54 yrs
55-59 yrs
60-64 yrs
65-69 yrs
70-74 yrs
75-79 yrs
80+ yrs

Source: Euromonitor International from official statistics

Table 9 Forecast Households 2010-2015

	2010	2011	2012	2013	2014	2015
Households ('000)						
Average number of occupants per household (number)						

Source: Euromonitor International from official statistics

MARKET DATA

Table 10 Retail Sales of Tissue and Hygiene by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Cotton Wool/Buds/Pads						
Incontinence						
Nappies/Diapers/Pants						
Sanitary Protection						
Wipes						
Retail Hygiene						
Kitchen Towels						
Paper Tableware						
Tissues						
Toilet Paper						
Retail Tissue						
Retail Tissue and Hygiene						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Cotton Wool/Buds/Pads			
Incontinence			
Nappies/Diapers/Pants			
Sanitary Protection			
Wipes			

Retail Hygiene	
Kitchen Towels	
Paper Tableware	
Tissues	
Toilet Paper	
Retail Tissue	
Retail Tissue and Hygiene	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Tissue and Hygiene Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Tissue and Hygiene Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Penetration of Private Label by Category 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Retail Tissue and Hygiene						
Retail Hygiene						
Cotton Wool/Buds/Pads						
Incontinence						
Sanitary Protection						
Wipes						
Retail Tissue						
Kitchen Towels						

Paper Tableware	
Tissues	
Toilet Paper	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Retail Sales of Tissue and Hygiene by Distribution Format: % Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Store-Based Retailing						
- Grocery Retailers						
- - Supermarkets/ Hypermarkets						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Forecourt Retailers						
- - - Independent Small Grocers						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
- - Mixed Retailers						
- - - Department Stores						
- - - Variety Stores						
- - - Mass Merchandisers						
- - - Warehouse Clubs						
- - Health and Beauty Retailers						
- - Other Non-Grocery Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- Internet Retailing						
- Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Retail Sales of Tissue and Hygiene by Category and Distribution Format: % Analysis 2010

% retail value rsp

	RH	CWB	IC	NDP	SP	W
Store-Based Retailing						
Grocery Retailers						
Supermarkets/Hypermarkets						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						

Independent Small Grocers						
Other Grocery Retailers						
Non-Grocery Retailers						
Mixed Retailers						
Department Stores						
Variety Stores						
Mass Merchandisers						
Warehouse Clubs						
Health and Beauty Retailers						
Other Non-Grocery Retailers						
Non-Store Retailing						
Vending						
Homeshopping						
Internet Retailing						
Direct Selling						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	RT	KT	PTW	TS	TP
Store-Based Retailing					
Grocery Retailers					
Supermarkets/Hypermarkets					
Discounters					
Small Grocery Retailers					
Convenience Stores					
Forecourt Retailers					
Independent Small Grocers					
Other Grocery Retailers					
Non-Grocery Retailers					
Mixed Retailers					
Department Stores					
Variety Stores					
Mass Merchandisers					
Warehouse Clubs					
Health and Beauty Retailers					
Other Non-Grocery Retailers					
Non-Store Retailing					
Vending					
Homeshopping					
Internet Retailing					
Direct Selling					
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: RH = retail hygiene; CWB = cotton wool/buds/pads; IC = incontinence; NDP = nappies/diapers/pants; SP = sanitary protection; W = wipes; RT = retail tissue; KT = kitchen towels; PTW = paper tableware; TS = tissues; TP = toilet paper

Table 17 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Cotton Wool/Buds/Pads						
Incontinence						

Nappies/Diapers/Pants	
Sanitary Protection	
Wipes	
Retail Hygiene	
Kitchen Towels	
Paper Tableware	
Tissues	
Toilet Paper	
Retail Tissue	
Retail Tissue and Hygiene	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Cotton Wool/Buds/Pads		
Incontinence		
Nappies/Diapers/Pants		
Sanitary Protection		
Wipes		
Retail Hygiene		
Kitchen Towels		
Paper Tableware		
Tissues		
Toilet Paper		
Retail Tissue		
Retail Tissue and Hygiene		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DEFINITIONS

This report analyses the market for Tissue and Hygiene in Thailand. For the purposes of the study, the market has been defined as follows:

- Sanitary protection
- Nappies/diapers/pants
- Incontinence products
- Wipes
- Cotton wool/buds/pads
- Retail tissue, an aggregation of:
- Toilet paper
- Tissues
- Kitchen towels
- Paper tableware
- Away-from-home (AFH) products

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources	Bangkokbiznews.com
	Manager.co.th
	Matichon. co.th
	National Economic & Social Development Board
	National Statistic Office
	Ryt9.com
	Thaipr.net
Trade Press	Bangkok Post
	BrandAge
	Business Thai
	Daily News
	Economy
	IQBiz
	Kam Gnem Kam Thanakam
	Krasae Hoon
	Krungthep Thurak j
	Manager WeekJy
	Marketeer
	Matichon
	Nation, The
	Neawna
	Newswit
	Positioning Mag
	Post Today
	Prachachart Thurakij
	Prachachat Newspaper
	Reuters
	Siam Thurakij
	Thai News
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