Passport

TISSUE AND HYGIENE IN THAILAND

Euromonitor International

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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

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Current Impact

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Outlook

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Future Impact

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Focus on Brand Strengthening for Tissue and Hygiene

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Current Impact

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Outlook

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Future Impact

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Manufacturers Focus on Cost Management To Gain A Competitive Advantage

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Current Impact

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Outlook

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Future Impact

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Innovation Alongside Continuous Advertising and Promotional Support

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Current Impact

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Outlook

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Future Impact

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

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Current Impact

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Outlook

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Future Impact

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MARKET INDICATORS

Table 1 Birth Rates 2005-2010

per '000 inhabitants

	2005	2006	2007	2008	2009	2010
Birth rates	Data removed from sample					

Source: Euromonitor International from official statistics

Table 2 Infant Population 2005-2010

'000

	2005	2006	2007	2008	2009	2010
0-4 yrs female	Data removed from sample					
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:	Data removed from sample					

January 1st	Data removed from sample
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 4 Total Population by Age 2005-2010

'000

	2005	2006	2007	2008	2009	2010
Population at January 1st	Data removed from sample					
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)	Data removed from sample					
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						

Data removed from sample

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						

Data removed from sample

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						

Data removed from sample

40-44 yrs	Data removed from sample
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)	Data removed from sample					
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	Data removed from sample					
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	Data removed from sample		
Incontinence			
Nappies/Diapers/Pants			
Sanitary Protection			
Wipes			

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

Data removed from sample

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
Data removed from sample					
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

Data removed from sample

Data removed from sample

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						

Data removed from sample

Paper Tableware	Data removed from sample
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	Data removed from sample					
- - 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	Data removed from sample					
Supermarkets/Hypermarkets						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						

Independent Small Grocers	Data removed from sample					
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	Data removed from sample				
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	Data removed from sample					
Incontinence						

Nappies/Diapers/Pants	Data removed from sample
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	Data removed from sample	
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 associa ions, 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
	IQ Biz
	Karn Gnem Karn Thanakarn
	Krasae Hoon
	Krungthep Thurak j
	Manager Weekly
	Marketeer
	Matichon
	Nation, The
	Neawna
	Newswit
	PositioningMag
	Post Today
	Prachachart Thurakij
	Prachachat Newspaper
	Reuters
	Siam Thurakij
	Thai News
	Thannews
	Thansethakij
	The Nation

Source: Euromonitor International

TISSUE AND HYGIENE IN THAILAND - COMPANY PROFILES

BERLI JUCKER CELLOX LTD IN TISSUE AND HYGIENE (THAILAND)

Strategic Direction

- Berli Jucker Cellox Ltd is planning to increase its production levels, with capacity running at only 90% in 2010. The company is seeking to improve its offer in terms of pricing and product quality in order to better respond to consumer demand and maintain its leading position in the increasingly competitive environment. In addition, the company will continue to manufacture for other small and large retailers nationwide.

Key Facts

Summary 2 Berli Jucker Cellox Ltd: Key Facts

Full name of company:	Berli Jucker Cellox Ltd
Address:	99 Soi Rubia, Sukhumvit 42 Road, Bangkok 10110, Thailand
Tel:	+66 2312 61158
Fax:	+66 2312 6173
www:	www.bjc.co.th
Activities:	Manufacturer and distr butor of toilet paper, tissues, kitchen towels and paper tableware

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

Summary 3 Berli Jucker Cellox Ltd: Operational Indicators

	2007	2008	2009
Net sales	Bt19,162.2 million	Bt22,242.8 million	Bt22,799.1 million
Net profit	Bt1,386.8 million	Bt1,254.4 million	Bt1,319.9 million

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

Company Background

- Berli Jucker Cellox Ltd is a subsidiary of Berli Jucker Plc. The company itself only manufactures, markets and distributes tissue and hygiene products. However, Berli Jucker Plc has wide coverage of many product lines including tissue and hygiene, sweet and savoury snacks, personal care and packaging, as well as technical and industrial products. The company also manufactures many brands under licence, as well as private label products.

- Berli Jucker Cellox Ltd is responsible for producing toilet paper, tissues, kitchen towels and paper tableware, with products offered under the brands of Cellox, Zilk, Belle, Dion, Maxmo, Yori and Melona. In 2010, around 15% of total production was for private label brands, particularly under the Tesco Lotus brand.
- Due to its expertise in producing and marketing tissue products, Berli Jucker Cellox Ltd has national coverage. Although urban demand forms the bedrock of the company's sales, Berli Jucker Cellox was attempting to expand and strengthen its rural and provincial demand. In terms of AFH business/industry sales, the company has been successfully expanding its presence in the provinces.

Production

- Berli Jucker Cellox Ltd uses domestic raw materials. Key raw materials required for production are recycled paper pulp that can be produced at its own factory in Samutprakran and Prachinburi. Recycled paper pulp accounted for 50% of total raw materials used, while the remainder is made from eucalyptus paper pulp and long fibre paper pulp in the proportion of 30% and 20%. Materials are domestically purchased and imported from countries including Canada and New Zealand.
- Domestic recycled paper pulp and short fibre paper pulp were mainly derived from Advance Agro Co Ltd, Phoenix Pulp & Paper Co Ltd and Siam Pulp & Paper Public Co Ltd. The proportion of domestic versus imported raw materials was 80:20 in 2010.
- Berli Jucker Cellox's products are not only marketed and distributed within Thailand; they are also exported to sell in neighbouring Asian countries, such as Laos, Vietnam, Cambodia and Singapore. In addition, the company expects to export to Middle Eastern countries and is exploring opportunities in penetrating this region.
- Berli Jucker Cellox is not expected to stop researching and developing new product innovations. To maintain its position as well as strong brand awareness among its target audience, the company offers a wide product portfolio that includes a range of price points. In addition, cost and production management are likely to be streamlined in order to achieve a low-cost and efficient production process.
- The company has two factories in different locations: Samutprakran and Prochinburi provinces. Total production capacity of both factories is 45,000 tonnes. In 2009, the company reported the production volume at around 41,301 tonnes, or about 92% of its capacity. The wide range of brands in its product portfolio accounted for around 65% of its production, while 14% was accounted for by private label brands and 21% was for away-from-home segment.

Competitive Positioning

- By increasing its production levels, Berli Jucker Cellox Ltd attempted to utilise more of its production capacity in order to act as an OEM for private label brands, especially for the Tesco Lotus brand, Leader Price for Big C, Tops for Tops Supermarket and Aero and Savepack for Makro Cash and Carry.
- The company manufactures products across a broad spectrum, from premium to economy private label products. Some private label brands such as Tops are considered premium as the retailer usually offers more premium products compared to the other players. Big C and Tesco Lotus are considered to be more mid-priced private label, while Savepack and Aero from Makro are considered to be economy brands as Makro is a cash and carry player and usually sells products in bulk.

- Private label players that Berli Jucker produces for are growing year on year in term of sales value. Tesco Lotus and Big C are the top players in hypermarkets while Tops is the leader in supermarkets. Tesco and Tops are expected to grow about 10% in value terms in 2010. Private label will continue to penetrate into the market as consumers are more familiar with the house brands image and are increasingly willing to use private label, particularly in tissue and hygiene where brand loyalty is relatively low compared with other consumer products, for example beauty and personal care or packaged foods.
- The share of overall private label shows as stagnant in terms of percentage at about 5% in retail tissue and hygiene. But its actual sale value is gradually grow year on year and reach about Bt1.13 billion in 2010. The reason behind a stagnant share is that private label still presence mainly in tissue products. Rather expanding across all categories, some retailers just focus on the market like toilet paper, napkins and tissues products. The penetration into nappies/diapers/pants, incontinence, sanitary protection is not yet very likely to be obvious as those products have a strong loyalty and high quality requirement from consumers. Therefore, private label is not yet able to capture share from the dynamic market.

Summary 4 Berli Jucker Cellox Ltd: Private Label Portfolio

Private Label Brand	Retailer Name	Category(ies)
Tesco, Khum Kha	Ek-Chai Distribution System Co Ltd	Sanitary protection, nappies/diapers/pants, incontinence, toilet paper, paper tableware, tissues, wipes
Tops, Home Fresh Mart	Central Retail Corp Ltd	Tissues, toilet paper, kitchen towels
Big C, Leader Price	Big C Supercenter Plc	Tissues, toilet paper, kitchen towels, paper tableware

Source: Euromonitor International from company reports, trade press

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

Strategic Direction

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Key Facts

Summary 5 DSG International (Thailand) PLC: Key Facts

Full name of company:	DSG International (Thailand) PLC

Address:	448/11 Soi Ladphao 53, Ladphao Road, Ladphao, Bangkok 10230, Thailand
Tel:	+66 2933 2921
Fax:	+66 2933 2888
www:	http://asia.dsgil.com/main.php
Activities:	Manufacturer and distributor of nappies/diapers/pants and incontinence products

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

Summary 6 DSG International (Thailand) PLC: Operational Indicators

	2008	2009	2010
Net sales	Removed	Removed	Removed
Net profit	Removed	Removed	Removed
Number of employees	Removed	Removed	Removed

Source: Euromonitor International from DSG International (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.

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Production

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Competitive Positioning

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Summary 7 DSG International (Thailand) PLC: Competitive Position 2010

Product type	% Value Share	Rank
Retail Tissue and Hygiene	Removed	Removed
Incontinence	Removed	Removed
Nappies/Diapers/Pants	Removed	Removed

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

FU BURG INDUSTRIAL CO LTD IN TISSUE AND HYGIENE (THAILAND)

Strategic Direction

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Key Facts

Summary 8 Fu Burg Industrial Co Ltd: Key Facts

Full name of company:	Fu Burg Industrial Co Ltd
Address:	136 Moo.3 Nonglalok, Bankhai Rayong, 21120, Thailand
Tel:	+66 3892 4142
Fax:	+66 3889 2376
www:	www.fuburg.com.tw
Activities:	Manufacturer of nappies/diapers/pants and incontinence products

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

Summary 9 Fu Burg Industrial Co Ltd: Operational Indicators

	2007	2008	2009

Net sales	Removed	Removed	Removed
Net profit	Removed	Removed	Removed

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

Company Background

- Fu Burg International Co Ltd is a subsidiary from parent company, Fu Burg Industrial Co Ltd, located in Taiwan. The company was established in August 1997 as a joint venture. With its first factory in Thailand, the company officially launched nappies/diapers/pants in 2001 and incontinence products in 2003.

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Production

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Competitive Positioning

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Summary 10 Fu Burg Industrial Co Ltd: Competitive Position 2010

Product type	% Value Share	Rank
Retail Tissue and Hygiene	Removed	Removed
Incontinence	Removed	Removed
Nappies/Diapers/Pants	Removed	Removed

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

MOONG PATTANA INTERNATIONAL PLC IN TISSUE AND HYGIENE (THAILAND)

Strategic Direction

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Key Facts

Summary 11 Moong Pattana International Plc: Key Facts

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

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

Summary 12 Moong Pattana International Plc: Operational Indicators

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

Source: Euromonitor International from company reports, company research, trade press, trade sources
Note: Net sales and profit shown were derived from Mom and Baby Care products

Company Background

- Moong Pattana International Plc'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.
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Production

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Competitive Positioning

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Summary 13 Moong Pattana International Plc: 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

WANG NT PAPER CO LTD IN TISSUE AND HYGIENE (THAILAND)

Strategic Direction

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Key Facts

Summary 14 Wang NT Paper Co Ltd: Key Facts

Full name of company:	Wang NT Paper Co Ltd
Address:	889 THAI-CC TOWER, 29th Floor, South Sathorn Road, Yannawa, Sathorn, Bangkok, 10120, Thailand
Tel:	+66 2210 0853 72
Fax:	+66 2675 8336
www:	www.wangkanai.co.th
Activities:	Manufacturer of tissues, paper tableware and toilet paper

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

Summary 15 Wang NT Paper Co Ltd: Operational Indicators

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

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

Company Background

- Wang NT Paper Co Ltd is an independent company owned by the Wangkanai Group, which is active in the sugar business. The Wangkanai Group entered a joint venture business with Nibong Tebal Paper Co Ltd which was Malaysia's largest producer of sanitary tissue paper. Wang NT Paper Co Ltd was thus established in 1999 with a registered capital of Bt150 million. In 2001 the company received The Best Factory 2001 award and ISO 9001-2000 from SGS in Thailand.

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Production

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Competitive Positioning

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Summary 16 Wang NT Paper Co Ltd: Competitive Position 2010

Product type	% Value Share	Rank
Retail Tissue and Hygiene	Removed	Removed
Retail Tissue	Removed	Removed
Paper Tableware	Removed	Removed
Tissues	Removed	Removed
Toilet Paper	Removed	Removed

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

AWAY-FROM-HOME TISSUE AND HYGIENE IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, away-from-home tissue and hygiene value sales grow by 11% to reach Bt3.8 billion
- Away-from-home tissue and hygiene is considered to be an area with low brand loyalty
- Value growth outperforms volume growth, with the average unit price rising slightly in 2010
- Away-from-home tissue and hygiene ire expected to grow at a CAGR of 7% in constant value terms over the forecast period to reach Bt5.3 billion in 2015

TRENDS

- In 2010, the demand for and consumption of away-from-home tissue and hygiene illustrated a positive performance thanks to an improvement in the economic situation in the country as well as the strong efforts of manufacturers. AFH toilet paper accounted for the largest share of value sales as it is used across many industries, including business/industry, horeca, hospitals/healthcare and public places.
- Compared to the CAGR of the review period, 2010 registered a slightly faster growth rate due to a number of favourable conditions. Improvements in service quality and intense competition saw a trend of upgrading as operators sought to provide good quality products and services for their customers. In addition, thanks to the expansion of workplace building, particularly in urban areas, as well as the expanding number of hotels and restaurants, the usage of away-from-home tissue and hygiene was on the rise. Both value and volume were therefore positively affected.
- The AFH incontinence category registered the highest value growth in 2010 at 15%. The use of incontinence products is predominantly within the hospitals/healthcare channel. The category registered a positive performance thanks to the support from a growing number of old people in Thailand. Healthcare and day care centres, as well as nursing homes, are focused on the care of elderly people and the service these institutions provide is constantly being improved as relatives of elderly patients insist on the best care.
- AFH wipers saw the second best value growth in 2010, rising by just under 15%. The expansion of more industrial manufacturers as well as offices in Thailand supports the growth of wipers; in the factory environment for example, it is necessary to have high levels of hygiene in order to prevent the spread of bacteria. Factories use wipers due to the convenience this product type offers in terms of cleaning (even heavy duty cleaning), which is unmatched by normal cloths or household wipes.
- While the demand for AFH toilet paper was pronounced across every distribution channel, the key contribution was derived from the business/industry and horeca channels, with value shares of 51% and 36% respectively. Growing demand was supported by the construction of more places of work, restaurants, shopping centres and fast food outlets.
- The unit price movement for AFH boxed facial tissue illustrated an increasing trend, partly due to consumers upgrading their choice of product quality and the rising cost of raw materials.

The use of boxed facial tissues was evident throughout horeca and business/industry, with shares of 58% and 33% respectively. As boxed facial tissues continued to provide high margins compared with other products within the AFH segment, many manufacturers showed interest in this area. The trend of premiumisation impacted the category.

- In 2010, napkins remained the only product within paper tableware in Thailand. As napkins showed no significant product development and innovation, the average unit price saw little movement. With no obvious product differentiation among brands, consumers tend to opt for the lower-priced products as they seek to achieve efficient cost management for their business. As a result, only slightly higher unit prices were recorded. In terms of product usage, demand for paper tableware was concentrated on the horeca and business/industry channels. Horeca was dominant, accounting for a value share of 78% in 2010.
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COMPETITIVE LANDSCAPE

- International players have a greater share of AFH tissue and hygiene sales than domestic manufacturers. The marketing teams of several players, such as Kimberly-Clarke Profession Thailand Co Ltd are better to penetrate the business/industry channel than other competitors. While brand names do not hold significant sway in the AFH segment, those operators that have well-established and familiar retail brands have an advantage as consumers are aware of their positioning and quality. Domestic players, on the other hand, focus on lower unit prices and operate as OEMs, adapting to the needs to other manufacturers.
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PROSPECTS

- Over the forecast period, the performance of away-from-home tissue and hygiene is likely to remain positive thanks to the developing trend of improved health and sanitary awareness. The channels contributing most strongly to this are likely to be horeca and business/industry, which both have room for growth. The category is expected to expand nationwide in both urban and rural areas. However, urban consumption is more promising for specific product types such as AFH boxed facial tissues, as well as AFH wipers because urban areas have a higher concentration of horeca and business/industry that use this AFH product. The demand for and use of other products such as incontinence products, toilet paper and napkins is expected to increase nationwide.

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CATEGORY DATA

Table 1 Away-From-Home Sales of Tissue and Hygiene by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Away-From-Home Hygiene	**Data removed from sample**					
- AFH Incontinence Products						
Away-From-Home Tissue						

- AFH Boxed Facial Tissues	Data removed from sample
- AFH Paper Tableware	
- AFH Paper Towels	
- AFH Toilet Paper	
- AFH Wipers	
Away-From-Home Tissue and Hygiene	

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

Table 2 Away-From-Home Sales of Tissue and Hygiene by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Away-From-Home Hygiene	Data removed from sample		
- AFH Incontinence Products			
Away-From-Home Tissue			
- AFH Boxed Facial Tissues			
- AFH Paper Tableware			
- AFH Paper Towels			
- AFH Toilet Paper			
- AFH Wipers			
Away-From-Home Tissue and Hygiene			

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

Table 3 Away-From-Home Sales of Tissue and Hygiene by Distribution Format: % Analysis 2005-2010

% away-from-home value

	2005	2006	2007	2008	2009	2010
Business/industry	Data removed from sample					
Horeca						
Hospitals/healthcare						
Public						
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, trade interviews, trade sources

Table 4 Away-From-Home Sales of Tissue and Hygiene by Category and Distribution Format: % Analysis 2010

% away-from-home value

	AH	AT
Business/industry	Data removed from sample	
Horeca		
Hospitals/healthcare		
Public		
Total		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources
Key: AH = away-from-home hygiene; AT away-from-home tissue

Table 5 Forecast Away-From-Home Sales of Tissue and Hygiene by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Away-From-Home Hygiene						
- AFH Incontinence Products						
Away-From-Home Tissue						
- AFH Boxed Facial Tissues						
- AFH Paper Tableware						
- AFH Paper Towels						
- AFH Toilet Paper						
- AFH Wipers						
Away-From-Home Tissue and Hygiene						

Data removed from sample

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

Table 6 Forecast Away-From-Home Sales of Tissue and Hygiene by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Away-From-Home Hygiene		
- AFH Incontinence Products		
Away-From-Home Tissue		
- AFH Boxed Facial Tissues		
- AFH Paper Tableware		
- AFH Paper Towels		
- AFH Toilet Paper		
- AFH Wipers		
Away-From-Home Tissue and Hygiene		

Data removed from sample

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

COTTON WOOL/BUDS/PADS IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, cotton wool/buds/pads retail value sales grow by 5% to reach Bt415 million
- Cotton wool/buds/pads sees little dynamism as a category within retail tissue and hygiene
- Value growth slightly outperforms volume growth, with the average unit price in 2010 reaching Bt262 per kg
- Bangplee Cotton Industry Co Ltd and Prairie Marketing Co Ltd lead cotton wool/buds/pads in 2010 with value shares of 42%, far ahead of the third-ranked player Bio Consumer Co Ltd with 5%
- Constant value sales of cotton wool/buds/pads are expected to grow at a CAGR of 2% over the forecast period to reach Bt452 million in 2015

TRENDS

- Cotton wool/buds/pads registered respectable growth in 2010, despite approaching maturity. There were no new product developments as manufacturers were attempting to serve consumers with existing products. The nature of the products within the cotton wool/buds/pads category means differentiation is not easily established. People generally perceive no obvious difference between products in terms of quality.
- As the category is reaching maturity, the 2010 value growth rate was in line with the review period average. Certain parts of the cotton wool/buds/pads consumer base are shrinking, meaning manufacturers are facing difficulties in terms of maintain demand. This is especially the case as a result of the declining birth rate, which is negatively impacting sales of cotton wool/buds/pads. More importantly, due to the lack of product development and innovation, the category's value sales were not supported.
- Despite no obvious new product developments in 2010, the average unit price in the category saw a slight increase. Manufacturers tended to transfer the increase in production and transportation costs to end consumers. Even though the private label cotton wool/buds/pads products are widely found in Thailand, such products had little impact on the category as a whole in value terms given that there was not a major difference in terms of retail price between branded and private label products.
- In terms of product variety, cotton wool maintained the largest share of value sales in 2010 at 45%, followed by cotton pads and cotton buds with 33% and 23% respectively. The share of cotton wool declined, while the other two both showed an increasing trend in 2010. Growing awareness in terms of hygiene and sanitation is rising among Thai consumers, which in turn is supporting sales of cotton buds and cotton pads. For cotton pads in particular, the growing demand and increased usage are being driven by women using the product to remove make-up.
- There were no new product developments within cotton wool in 2010. Cotton wool continued to be offered in a round, ball shape in either a zip-lock plastic bag or plastic container. Demand for cotton wool products in other formats was limited among Thai consumers and

brand loyalty remained low. Product usage is concentrated among consumers with babies and women who use it for cleansing/make-up removal purposes.

- The area of cotton pads was more competitive than cotton wool. Demand was more complicated as there are two product formats – rimmed and rimless – that provide consumers with a choice. The key target consumers are women using cotton pads for cosmetic and facial skin cleansing purposes. The usage of cotton pads is supported by health and beauty trends. Thanks to increasing usage of cosmetics among Thai females, who are starting to use these products at a younger age, cotton pads have seen an increase in popular.
- Products within the cotton wool/buds/pads category in Thailand are offered at a low price; the retail price is very competitive since branded and private label products are offered at a similar price point. Manufacturers were keen to concentrate on their pricing strategy rather than new product development or any other factors that are not considered as criteria for a purchase. As a result, organic cotton wool products have yet to be introduced in Thailand.

COMPETITIVE LANDSCAPE

- Thanks to strong brand awareness and widespread product availability, Bangplee Cotton Industry Co Ltd and Prairie Marketing Co Ltd led cotton wool/buds/pads in 2010 with a value share of 42% each, followed by Bio Consumer Co Ltd with 5%. Bangplee Cotton Industry Co Ltd owned its flagship Ambulance brand, while Prairie Marketing Co Ltd has two strong brands Evergreen and Rabbit. Bio Consumer Co Ltd markets its product offer under the D-Nee brand.

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PROSPECTS

- Moderate growth is expected for cotton wool/buds/pads over the forecast period. The category is unlikely to be subject to major factors driving demand; it will remain non-dynamic in terms of new product development and aggressive marketing strategies. Nonetheless, the manufacturers will aim to expand their distribution network, covering both urban and provincial areas with the purpose of strengthening both share and positioning.

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CATEGORY DATA

Table 1 Retail Sales of Cotton Wool/Buds/Pads: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Cotton Wool/Buds/Pads	Data removed from sample					

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

Table 2 Retail Sales of Cotton Wool/Buds/Pads: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Cotton Wool/Buds/Pads	Data removed from sample		

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

Table 3 Retail Sales of Cotton Wool/Buds/Pads by Type: % Value Breakdown 2007-2010

% retail value rsp

	2007	2008	2009	2010
Cotton Buds	Data removed from sample			
Cotton Wool				
Cotton Pads				
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 4 Cotton Wool/Buds/Pads Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Data removed from sample					
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 5 Cotton Wool/Buds/Pads Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Data removed from sample					

Data removed from sample

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 6 Forecast Retail Sales of Cotton Wool/Buds/Pads: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Cotton Wool/Buds/Pads	Data removed from sample					

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

Table 7 Forecast Retail Sales of Cotton Wool/Buds/Pads: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Cotton Wool/Buds/Pads	Data removed from sample	

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

INCONTINENCE IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, the incontinence category's current retail value sales grow by 18% to reach Bt1.5 billion
- Greater penetration is witnessed for incontinence products
- Value growth outperforms volume growth, reflecting a 2% unit price rise to reach Bt18.7 per unit in 2010
- DSG International (Thailand) PLC leads incontinence in 2010 with a value share of 58%
- Incontinence retail value sales are expected to grow at a CAGR of 15% in constant terms to reach Bt3 billion in 2015

TRENDS

- The use of and demand for incontinence products reflected an increasing importance in Thailand in 2010. Thanks to a growing number of elderly people in society and a shift towards more active lifestyles and modernisation, demand is increasing nationwide. There are primary and secondary target users for incontinence products. Elderly people encountering incontinence problems are the key target users, whereas patients having temporary problems are considered a secondary target.
- Thanks to the positive performance of incontinence products in Thailand, growth of 18% in value terms in 2010 was faster than the average rate seen over the review period. The category expanded throughout urban and rural areas, with a variety of product offerings. Manufacturers continued to educate target audiences, together with strengthening brand awareness for long-term sustainability.
- In 2010, the use of incontinence products was neither subsidised for elderly people nor covered by any health insurance policies. People can easily acquire incontinence products through modern and traditional retail channels, including health and beauty retailers and the product does not require a prescription. However, in the case of patients being admitted to hospital, the cost of incontinence products would be claimed against health insurance policies, as any other expenditure.
- As hospitals/healthcare is important for incontinence products, leading players focus on driving sales in the channel, although competition via the channel is not particularly intense, being a tender process. By building a presence in this channel, brands would consequently be able to build trust and positive images among consumers. In the incontinence category, DSG International (Thailand) PLC was very strong within the hospitals/healthcare channel. With its brands being selected by hospitals, they gained high acceptance. With incontinence products tending to be used by older people, this consumer group's innate strong brand loyalty means that they are unlikely to switch brands after their hospital stay.
- Due to the perception that thicker pads provide more effective absorbency and longer usage, moderate/heavy products received greater acceptance among Thai consumers, whereas light products remained less popular over the review period. This trend was carried through 2010.

Consumers, particularly those who are price sensitive, tend to perceive moderate/heavy products as offering better value for money, requiring fewer changes.

- In incontinence products, different products are available for different uses, including adult nappies/diapers, pants, pad inserts/shields and bed covers/protectors. As adult nappies/diapers and pants are widely used by elderly consumers with incontinence problems, moderate/heavy products were popular. Pads, liners, shields and guards are used for additional protection to double-up the absorbency, in an effort to reduce the frequency of changes as well as being used for lighter incontinence problems.
- The incontinence category saw an increase in unit price in 2010. New product developments and aggressive marketing activities helped drive unit prices upwards. More importantly, manufacturers were not afraid of pushing a slightly higher price offering since they have realised that target consumers tend to have brand loyalty and generally do not switch from familiar products. As a result, premium products enjoyed demand among a specific group of consumers, despite the competitive marketplace.
- Modern retail channels remain key for incontinence products, with supermarkets/hypermarkets accounting for 63% of value sales in 2010 and offering every brand available. Health and beauty retailers was the second most important distribution channel with a share of 33%, followed by department stores with a 5% value share. Health and beauty specialist retailers continually lose the share to supermarkets/hypermarkets as the latter penetrated the market faster especially in terms of number of outlets and outlet size. Furthermore, consumers feel that incontinence products becomes more common which increasingly negates the need to buy from health and beauty specialist retailers.
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COMPETITIVE LANDSCAPE

- Thanks to its wide product portfolio and strong brand loyalty, DSG International (Thailand) PLC led the incontinence category in 2010 with a value share of 58%, followed by Fu Burg Industrial Co Ltd with 22%. The latter is a Taiwanese company with an expertise in sanitary protection. The company operates the AnAn, AnCare, Feelfree and Medicos brands, tapping into several segments. Unicharm Thailand Co Ltd was ranked third in terms of company share, with the Lifree brand accounting for a 10% share.
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PROSPECTS

- Over the forecast period, the incontinence category is expected to generate significant growth thanks to both demand and supply factors. Manufacturers will be likely to seek to expand the consumer base to achieve more sales, as well as educate and inform the target audience, namely elderly people and “gatekeepers”. The hygiene and sanitary trends are likely to be counted as key supportive factors, while the ageing population will automatically drive demand into the forecast period.

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CATEGORY DATA

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

Bt million

	2005	2006	2007	2008	2009	2010
Light Incontinence	Data removed from sample					
Moderate/Heavy Incontinence						
Incontinence						

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

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

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Light Incontinence	Data removed from sample		
Moderate/Heavy Incontinence			
Incontinence			

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

Table 3 Incontinence Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Data removed from sample					
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 Incontinence Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Data removed from sample					
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 Incontinence by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015

Light Incontinence	Data removed from sample
Moderate/Heavy Incontinence	
Incontinence	

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

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

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Light Incontinence	Data removed from sample	
Moderate/Heavy Incontinence		
Incontinence		

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

NAPPIES/DIAPERS/PANTS IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, nappies/diapers/pants current retail value sales grow by 15% to reach Bt8 billion
- The category still demonstrates scope for growth
- Value growth outperforms the volume growth, reflected in an increased average unit price of Bt11 in 2010
- Unicharm Thailand Co Ltd leads nappies/diapers/pants in 2010 with a value share of 48%
- Nappies/diapers/pants retail value sales are expected to grow at a CAGR of 10% in constant terms to reach Bt13 billion in 2015

TRENDS

- The category of nappies/diapers/pants in Thailand showed positive growth in 2010. With quality of life improvements, greater product penetration was witnessed among urban and rural parents. The purchase of nappies/diapers/pants tends to see high brand loyalty and low price sensitivity, with parents willing to pay a certain level of high price to get good quality products for their infants, despite tightening their belts in other aspects of their lives. Thus demand for nappies/diapers/pants was not impacted by macroeconomic factors to the same degree as other categories.
- Compared to the review period average, 2010 saw a stronger growth rate. The level of penetration for nappies/diapers/pants remains comparatively low, with scope for growth foreseen. Leading manufacturers are keen to develop and expand the consumer base and are thus driving a faster growth rate. In addition, new product developments helped drive overall value sales.
- Amongst all categories of nappies/diapers/pants, disposable pants registered the fastest value growth. The product type became more popular among Thai parents, being easy to wear, providing greater comfort and convenience. Despite disposable pants being offered at a higher price compared to other products in nappies/diapers/pants, Thai parents able to afford them demonstrated high brand loyalty.
- Unit prices increased in 2010. The strong sales growth of disposable pants helped drive the overall unit price movement since this category's unit price is considerably higher than the category as a whole. In addition, there was an increase in production costs, particularly for raw materials, in 2010. It was impossible for manufacturers to maintain their previous pricing levels whilst sustaining margins at an acceptable level. They had to pass partial cost increases onto end consumers. Unlike other tissue and hygiene products, people tend to be less price sensitive when purchasing nappies/diapers/pants. Parents are normally willing to pay more for the products used for their infants.
- The category of nappies/diapers/pants is characterised by a relatively low penetration rate. Moreover, low frequency of usage per day was witnessed among this group of consumers. In 2010, in rural areas which have lagged behind urban areas, the usage of nappies/diapers/pants was increasing as parents became educated on their usage. Usage among Thai parents tended to vary between different types of products. Compared to the 4-6

units of nappies/diapers changed per day for babies aged 3-4 months, babies aged over six months had their nappy changed less often, at a rate of 2-3 units a day.

- In nappies/diapers/pants, product innovation is focused on specific additional benefits, in terms of functionality and emotional aspects. Thai parents look for nappies/diapers/pants that can offer their infants more comfort, dryness, no irritation, flexibility and which soothe the skin. In addition, good absorbency, leakage protection and slim properties with cartoon graphic designs were additional attributes which parents sought.
- The usage of nappies/diapers/pants is not affected by cultural or traditional factors. As their usage is widespread, although the frequency of use remains low, more and more parents tend to opt for nappies/diapers/pants for their babies. Only a small portion of parents still use the traditional method of cloth nappies/diapers. Where these are still used, cost rather than culture or tradition is the key factor.

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COMPETITIVE LANDSCAPE

- Thanks to its strong brand loyalty and the good corporate image of Mamy Poko from Unicharm Thailand Co Ltd maintained its leading position in nappies/diapers/pants in 2010, with a value share of 48%. The company continued to enjoy its overwhelming success by acquiring a large customer base. DSG International (Thailand) PLC ranked second with a share of 17%, reflecting its wide brand portfolio of Baby Love, Fitti and Petpet. With a focus on the premium segment, SCA Hygiene (Thailand) Co Ltd ranked third with a value share of 16%, marketing the brands Drypantz and Drypers Wee Wee Dry.

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PROSPECTS

- Over the forecast period, the scope for growth for nappies/diapers/pants is likely to be attractive to existing manufacturers as well as newcomers. Manufacturers will aim to strengthen brand awareness as well as maintain and expand their customer base. They will also attempt to boost frequency of use for nappies/diapers/pants for both day and night time, this increase in consumption being an effective approach to building sales. Although consumption throughout urban areas is substantial, the demand and needs in rural areas are not yet fulfilled.

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CATEGORY DATA

Table 1 Retail Sales of Nappies/Diapers/Pants by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Disposable Pants	Data removed from sample					
Nappies/Diapers						
- Junior Nappies/Diapers						
- New Born Nappies/ Diapers						
- Standard Nappies/ Diapers						
Nappies/Diapers/Pants						

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

Table 2 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Disposable Pants	Data removed from sample		
Nappies/Diapers			
- Junior Nappies/Diapers			

- New Born Nappies/Diapers	Data removed from sample
- Standard Nappies/Diapers	
Nappies/Diapers/Pants	

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

Table 3 Nappies/Diapers/Pants Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Data removed from sample					
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 Nappies/Diapers/Pants Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Data removed from sample					

Data removed from sample

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 Nappies/Diapers/Pants by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Disposable Pants						
Nappies/Diapers						
- Junior Nappies/Diapers						
- New Born Nappies/ Diapers						
- Standard Nappies/ Diapers						
Nappies/Diapers/Pants						

Data removed from sample

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

Table 6 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Disposable Pants		
Nappies/Diapers		
- Junior Nappies/Diapers		
- New Born Nappies/Diapers		
- Standard Nappies/Diapers		
Nappies/Diapers/Pants		

Data removed from sample

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

SANITARY PROTECTION IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, sanitary protection retail value sales increase by 7% to reach Bt5.2 billion
- While towels remains the most significant category, pantyliners sees an increase in popularity
- Value growth outperforms volume growth, pushing up the average unit price by 1% in 2010
- Unicharm Thailand Co Ltd leads sanitary protection in 2010 with a value share of 39%, followed by Kao Industrial (Thailand) Co Ltd with 27% and Johnson & Johnson (Thailand) Ltd with 23%
- Sanitary protection retail value sales are expected to grow at a CAGR of 3% in constant terms to reach Bt6.1 billion in 2015

TRENDS

- The category of sanitary protection in Thailand witnessed positive growth in 2010. There was an increase in consumption and usage. Given the already high penetration rate, manufacturers attempted to motivate demand by other means, such as an increase in product usage or demand for better product quality. Towels remained the most prevalent sanitary protection product in the Thai market. Standard towels accounts for a larger proportion of sales than ultra-thin towels, while day towels outsell night formats. Competition remained intense, while innovative new products remained a focus.
- Compared to the CAGR seen over the review period, 2010 registered a faster growth rate. This performance was driven by effective sales pushes by leading manufacturers. Additionally, the category is still seen as attractive, with scope for growth, thus newcomers entered. For example, Modern Soft Products Co Ltd commenced marketing towels under the brand Midori. Despite the difficult wider economic climate, sanitary protection saw very little impact since the products are considered to be a necessity.
- While most categories in sanitary protection registered single-digit growth, the categories of pantyliners and ultra-thin towels with wings saw a stronger performance. Demand for pantyliners was driven by manufacturers, which improved the product assortment on a number of fronts. Thai women increasingly used pantyliners for daily cleanliness and hygiene purposes, whereas ultra-thin towels with wings continued to be the preferred format for increasingly popular night-time sanitary protection, given their greater level of security.
- Unit prices increased in 2010. New product developments helped push the price h ke, especially in the categories of pantyliners and ultra-thin towels. Manufacturers attempted to drive sales by developing more sophisticated and expensive products to serve the unmet needs of Thai women. Value-added and additional benefits for products consequently created a higher selling price.
- Among different types of sanitary protection, tampons remained unpopular, showing the lowest value sales. Although long-established in the marketplace, Thai consumers are not familiar with their usage. The product therefore only sells to consumers who remain in niche groups, including foreigners and people who have lived abroad. In contrast, pantyliners grew increasingly popular. Having reached just half of the total market in terms of penetration, the

potential for further growth is very promising and manufacturers were trying to educate target consumers on the benefits of their use. Marketing tools for example TV commercials and advertorials in magazines were used to highlight that pantyliners can deliver daily cleanliness and freshness.

- Different types of sanitary protection had different key purchasers. Tampons were attractive to a niche group of consumers, namely foreigners, people who have lived abroad, tourists or even urban women. Most Thai women opt for towels, with standard types remaining more popular than ultra-thin types since the former is usually offered at a more affordable price. In addition, pantyliner usage was growing, with this format being affordable to all levels of consumers. Manufacturers sought to highlight their advantages in terms of cleanliness among consumers.
- Sanitary protection is considered an essential product type by women. Towels remained a popular choice for cultural reasons, which also explains the resistance to tampons.
- In terms of the availability of tampons in Thailand, both digital and applicator types are offered. Digital remains much more popular thanks to their user-friendly attributes. The trend of tampon usage is likely to decline over the forecast period as fewer consumers use this product. Demand will continue to be marginal and remain niche.

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COMPETITIVE LANDSCAPE

- Brand and company rankings in sanitary protection remained largely unchanged in 2010 thanks to the strong foothold and positions held by the leading manufacturers. Owning the brand Sofy, Unicharm Thailand Co Ltd led sanitary protection in 2010 with a value share of 39%, followed by Kao Industrial (Thailand) Co Ltd with 27% and Johnson & Johnson (Thailand) Ltd with 23%. While Sofy enjoyed a positive performance, Laurier from Kao Industrial (Thailand) also managed to fare well by applying aggressive marketing tactics. A wide product portfolio, with the different brands of Modess, Carefree and o b saw Johnson & Johnson (Thailand) Ltd cover and serve a wide spectrum of the category.

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PROSPECTS

- More intense competition is expected for sanitary protection over the forecast period. Operators will be likely to compete aggressively in order to maintain their position and gain share. New product innovations will be developed with the purpose of responding to more sophisticated demand. Consumption and usage is likely to be motivated by more than one factor thanks to the continuing trend of sanitary and feminine hygiene.

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CATEGORY DATA

Table 1 Sanitary Towels by Type of Use: % value analysis 2005-2010

% value

	2005	2006	2007	2008	2009	2010
Day	Data removed from sample					
Night						
Total	100.0	100.0	100.0	100.0	100.0	100.0

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

Table 2 Retail Sales of Sanitary Protection by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010

Intimate Wipes	Data removed from sample
Sanitary Protection Excluding Intimate Wipes	
- Pantyliners	
- Tampons	
- Towels	
Sanitary Protection	

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

Table 3 Retail Sales of Sanitary Protection by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
Intimate Wipes	Data removed from sample		
Sanitary Protection Excluding Intimate Wipes			
- Pantyliners			
- Tampons			
- Towels			
Sanitary Protection			

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

Table 4 Retail Sales of Tampons by Application Format: % Value Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Applicator Tampons	Data removed from sample					
Digital Tampons						
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 5 Sanitary Protection Retail Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Data removed from sample					
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 6 Sanitary Protection Retail Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Data removed from sample					
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 7 Forecast Retail Sales of Sanitary Protection by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Intimate Wipes	Data removed from sample					
Sanitary Protection Excluding Intimate Wipes						
- Pantyliners						
- Tampons						
- Towels						
Sanitary Protection						

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

Table 8 Forecast Retail Sales of Sanitary Protection by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Intimate Wipes	Data removed from sample	
Sanitary Protection Excluding Intimate Wipes		
- Pantyliners		
- Tampons		
- Towels		

Sanitary Protection

Data removed from sample

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

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.

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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.

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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	Data removed from sample					
- 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	Data removed from sample		
- 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

Data removed from sample

Data removed from sample

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

Data removed from sample

Data removed from sample

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						

Data removed from sample

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		

Data removed from sample

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

RETAIL TISSUE IN THAILAND - CATEGORY ANALYSIS

HEADLINES

- In 2010, retail tissue current value sales grow by 7% to reach Bt6.2 billion
- Product innovation drives growth of retail tissue
- Value growth outperforms volume growth, with average unit prices rising by 1% in 2010 to reach Bt113 per unit
- Kimberly-Clark Thailand Co Ltd leads retail tissue in 2010 with a value share of 38%, followed by Berli Jucker Cellox Ltd with 31% and Thana Paper Ltd with 6%
- Retail tissue constant value sales are expected to grow at a CAGR of 3% to reach Bt7.3 billion in 2015

TRENDS

- Demand for retail tissue products continued to grow among Thai consumers in 2010 thanks to greater product penetration following strong efforts by manufacturers. Many manufacturers attempted to establish a wide product portfolio by having either one umbrella brand or many brands for specific categories within retail tissue. While consumer demand is becoming more sophisticated, new product launches remained as key drivers of growth, largely supported by integrated marketing communication and activities. Branding played an important role within consumers' purchasing decision. In addition, various types of marketing tactics were employed to stimulate sales.
- Within retail tissue in Thailand, there are various types of products available, namely toilet paper, tissues, kitchen towels and paper tableware. Toilet paper accounted for the largest share of sales, benefiting from strong product penetration in the country and its positioning as an essential product. Tissues were the second biggest category, recording 7% value growth in 2010. Many Thai consumers tend to confuse the real purpose of different product types within retail tissue, for example, using toilet paper as a substitute for other types of retail tissue. This contributes to the strong product penetration of toilet tissue compared with the lower penetration rates of other product types including tissues, kitchen towels and paper tableware. It is also due to the fact that the other products are considered non-essential and are more expensive compared with toilet paper.
- Boxed facial tissues saw the fastest value growth at almost 8%. Boxed facial tissues is becoming more popular among Thailand consumers due to the convenience the product provides and its softness. Main players like Kimberly-Clark Thailand Co Ltd and Berli Jucker try to promote and emphasize on the fact that boxed facial tissue is softer compared to toilet paper and better to use on the face. The other development for example design of the box can make boxed facial tissue gain more popularity as well.
- Napkins is the only product type within paper tableware in Thailand, registering growth of 7% in value terms. Paper tableware is the smallest category within retail tissue and it has more room to grow. Products within the napkins category have gained popularity due to consumers becoming increasingly sophisticated, viewing napkins as essential items for a house party or other events.

- In 2010, only dry toilet paper was available in Thailand. The products were offered in a wide price range from economy to luxury. The leading players were respons ble for researching what consumers need and want for example, in terms of print and designs to feature on toilet paper. In addition, other areas such as sales and marketing, distribution and the production process were focused upon and strengthened with the purpose of achieving greater efficiency and economies of scale In terms of unit price movement, an increasing shift was noted towards value-added products that offer extra benefits.
- Standard and luxury brands accounted for the majority of sales in retail tissue in 2010, a trend that continued throughout the review period. Unit price was considered a key factor within the purchasing decision. Nevertheless, manufacturers normally had wide product coverage across the price spectrum. For example, Berli Jucker Cellox Ltd provides a series of brands to appeal to different tiers of consumers. It offers Kleenex and Cellox for premium brands, Zilk as a standard brand and Belle as an economy brand. The company was also an OEM for private label brands positioned as super economy.
- 100% recycled products were not a key focus in retail tissue. Kimberly-Clark Thailand Co Ltd was a leading manufacturer as a green company however it does not really emphasise its green product credentials, rather it uses this positioning to support the company's corporate social responsibility. The demand for green products in Thailand remains low as consumers are not educated on the importance of environmentally-friendly products, therefore recycled materials are not considered key when making a purchase.

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COMPETITIVE LANDSCAPE

- Thanks to their wide product portfolios that give them a presence across the categories of retail tissue, Kimberly-Clark Thailand Co Ltd and Berli Jucker Cellox Ltd led retail tissue in 2010 with a value share of 38% and 31% respectively. Kimberly-Clark Thailand Co Ltd offered the Kleenex, Scott and Tiss brands, whereas Berli Jucker Cellox Ltd had Cellox, Zilk and Belle in its portfolio. Thana Paper Ltd, owning the brand Primrose and Sit 'n' Smile, was ranked third with a value share of 6% in 2010, achieved by concentrating on the standard to economy segment.

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PROSPECTS

- Although retail tissue is expected to register a weaker performance over the forecast period, positive growth is anticipated, with a strong dependence on new product development as well as marketing support. These new launches are likely to offer value-added benefits. As the competitive environment in retail tissue is set to intensify, manufacturers are challenged to maintain their positions in the marketplace and they have to become more active in order to satisfy sophisticated consumer demand.

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CATEGORY DATA

Table 1 Retail Tissue Sales by Category: Value 2005-2010

Bt million

	2005	2006	2007	2008	2009	2010
Kitchen Towels						
Paper Tableware						
- Napkins						
- Tablecloths						
Tissues						
- Boxed Facial Tissues						
- Pocket Handkerchiefs						
Toilet Paper						
- Economy Toilet Paper						
- Luxury Toilet Paper						
- Recycled Toilet Paper						
- Standard Toilet Paper						
Retail Tissue						

Data removed from sample

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

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

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL

Kitchen Towels	Data removed from sample
Paper Tableware	
- Napkins	
- Tablecloths	
Tissues	
- Boxed Facial Tissues	
- Pocket Handkerchiefs	
Toilet Paper	
- Economy Toilet Paper	
- Luxury Toilet Paper	
- Recycled Toilet Paper	
- Standard Toilet Paper	
Retail Tissue	

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

Table 3 Retail Tissue Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Data removed from sample					
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 Retail Tissue Brand Shares 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Data removed from sample					

Data removed from sample

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 Tissue Sales by Category: Value 2010-2015

Bt million

	2010	2011	2012	2013	2014	2015
Kitchen Towels	Data removed from sample					
Paper Tableware						
- Napkins						
- Tablecloths						
Tissues						
- Boxed Facial Tissues						
- Pocket Handkerchiefs						
Toilet Paper						
- Economy Toilet Paper						
- Luxury Toilet Paper						
- Recycled Toilet Paper						
- Standard Toilet Paper						
Retail Tissue						

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

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

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Kitchen Towels	Data removed from sample	
Paper Tableware		
- Napkins		
- Tablecloths		
Tissues		
- Boxed Facial Tissues		
- Pocket Handkerchiefs		
Toilet Paper		
- Economy Toilet Paper		
- Luxury Toilet Paper		
- Recycled Toilet Paper		
- Standard Toilet Paper		
Retail Tissue		

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