

Emerging Markets Hygiene Product White Paper



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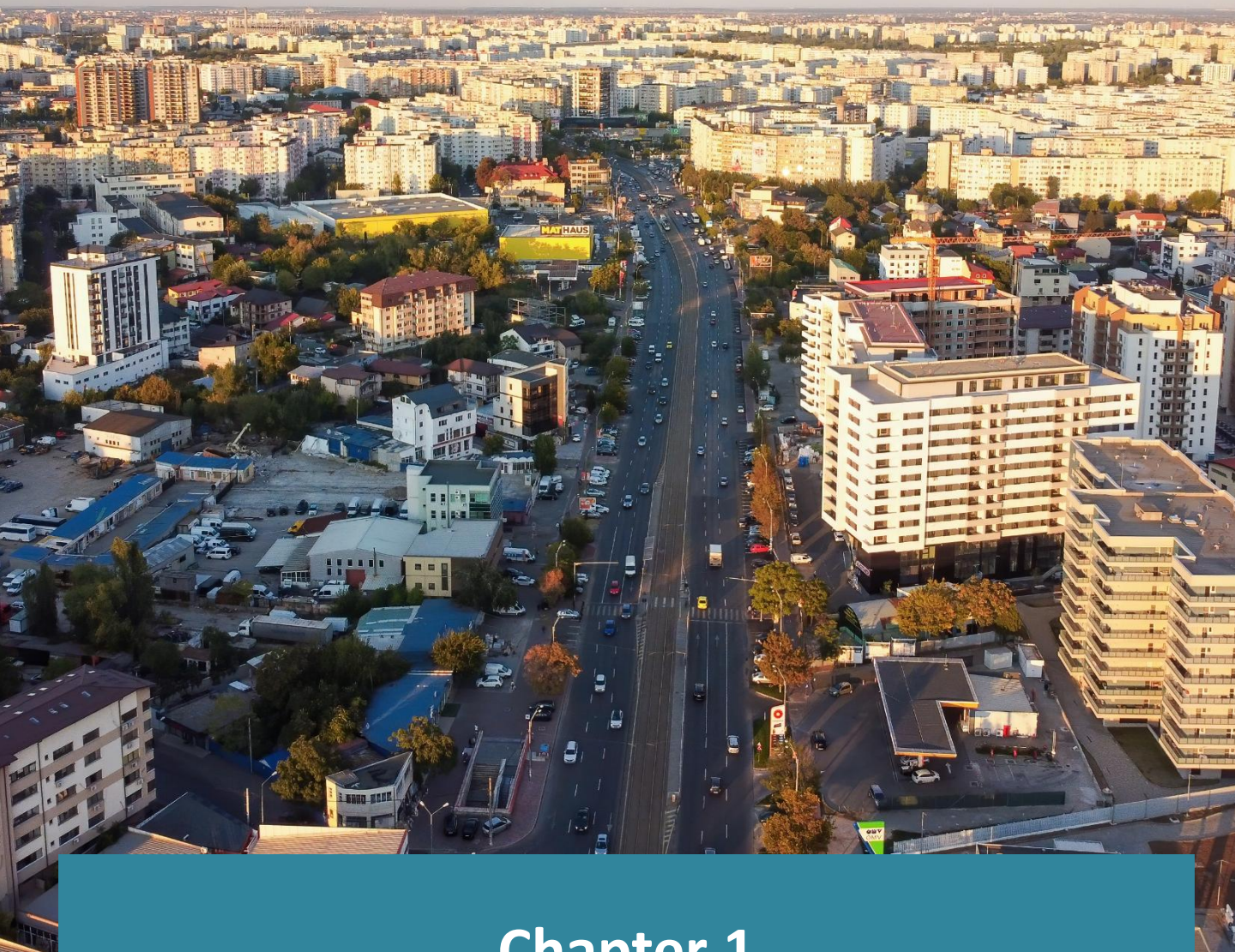
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Executive Summary



- This white paper provides a comprehensive analysis of the hygiene product industry in emerging markets, offering strategic insights for industry players. Emerging markets are characterized by young populations, rapid economic growth, and vast consumer potential. The hygiene product industry in these regions features unique traits such as dispersed sales networks, reliance on offline purchases, and multi-layered distribution channels. The value chain includes upstream raw material suppliers, midstream manufacturers, and downstream distributors, with growth driven by demand-side factors (e.g., high birth rates, rising incomes), supply-side innovations (e.g., product globalization), and supportive policies. However, there are also barriers to entry, including requirements in production localization, quality control, and brand building.
- The baby diapers and baby pants industry in emerging markets not only enhances infant comfort but also creates business opportunities and drives economic growth. Markets in Africa and Central Asia are experiencing rapid expansion due to population growth and economic development. Future trends indicate a shift toward brand and quality consciousness, with product innovation and supply chain stability becoming critical. The market is highly concentrated, dominated by brands like Softcare, Procter & Gamble, and Kimberly-Clark.
- Similarly, the feminine hygiene products industry holds significant value, promoting women's health, gender equality, and business growth. The sanitary pads market is expanding, particularly in Africa, with future trends pointing toward product diversification, personalization, and technological innovation. Local production and supply chain optimization will be key focus areas. The market is also concentrated, with Softcare leading in several African regions.
- The paper identifies industry pain points, such as price sensitivity and insufficient market education, and proposes upgrading strategies. Key success factors include supply chain integration and brand-building capabilities. It also highlights emerging opportunities and challenges, recommending actions like promoting industry standards, focusing on consumer needs, cost control, and strengthening government-business collaboration.



Chapter 1

Overview of Emerging Markets Hygiene Product Industry



Definition and Classification of Emerging Markets



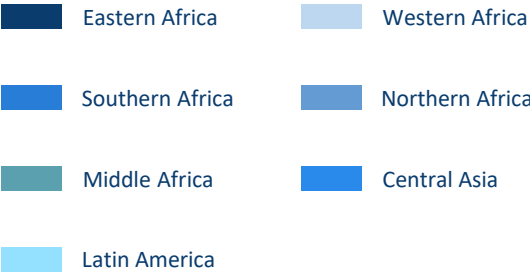
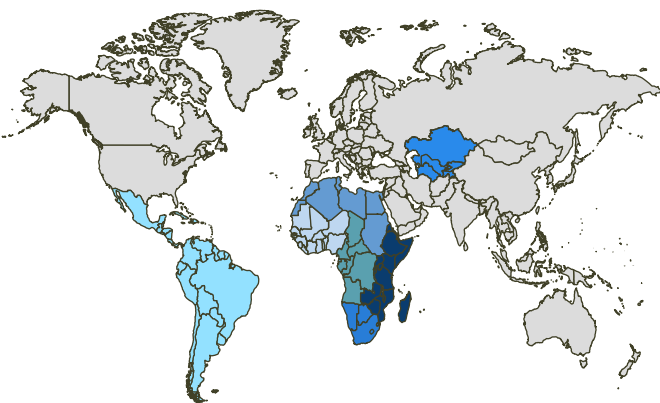
Definition



Emerging markets are nations or regions with a strong industrial base and standardized commercial mechanisms, distinct from developed "mature markets." The IMF classifies 39 economies as "developed" based on income levels, export diversity, and financial integration, while the rest fall under "emerging and developing economies." Among them, 40 countries, mainly in **Africa, Latin America, and Central Asia**, are identified as "emerging market and middle-income economies." These markets sustain robust growth, produce high-value-added goods, and increasingly resemble developed economies in income and global trade participation.



Classification



Eastern Africa

Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Malawi, Mauritius, etc.

Western Africa

Benin, Burkina Faso, Cape Verde, Ivory Coast, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo, etc.

Southern Africa

Botswana, Lesotho, Namibia, South Africa, Eswatini, Zambia, etc.

Northern Africa

Algeria, Egypt, Libya, Mauritania, Morocco, Sudan, Tunisia, etc.

Middle Africa

Angola, Cameroon, Central African Republic, Chad, Republic of the Congo, Equatorial Guinea, etc.

Central Asia

Kazakhstan, Uzbekistan, Turkmenistan, etc.

Latin America

Peru, Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica, etc.

Characteristics of Emerging Markets

Young Demographic Structure



- The population structure of emerging markets is relatively young, and the population pyramid is expansive (wide bottom and narrow top). A large number of young labor forces make the labor cost low, which provide strong human resources for economic development.

Relatively Dispersed Market



- Particularly in Africa, emerging markets feature a dispersed population, leading to a market that is generally spread out and grid-like. This necessitates targeted marketing strategies tailored to the local population.

Rapid Economic Growth



- Overall, the market scale of various industries is generally small, and there are abundant investment opportunities, including infrastructure construction, manufacturing upgrading, service industry expansion, etc. Furthermore, the growth rate of these industries is fast, which is an important driving force for global economic growth.

Vast Potential in Consumer Market



- Emerging markets are generally characterized by a scarcity of materials, as most countries have a low level of indigenous industrialization, necessitating the import of various essential goods through trade.
- For instance, Africa has a high demand for products from large items such as steel and machinery to small goods such as smartphones and handicrafts, including daily essentials such as baby diapers and plastic items.

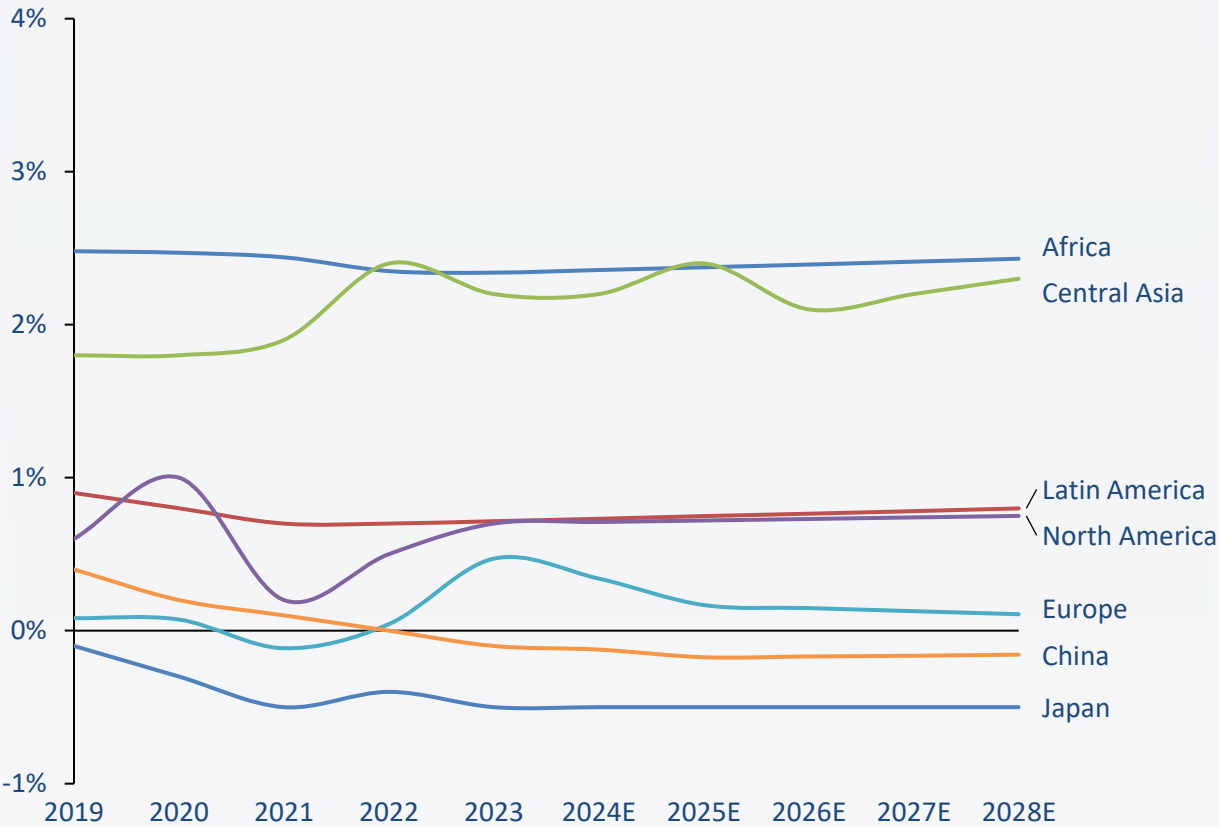
Integration Acceleration



- Emerging markets are actively advancing regional economic integration processes, strengthening economic cooperation with other countries, and enhancing the level of trade liberalization, which will provide more market opportunities and investment space for businesses

Characteristics of Emerging Markets

Population Growth Rate, by Different Regions
%, 2019-2028E



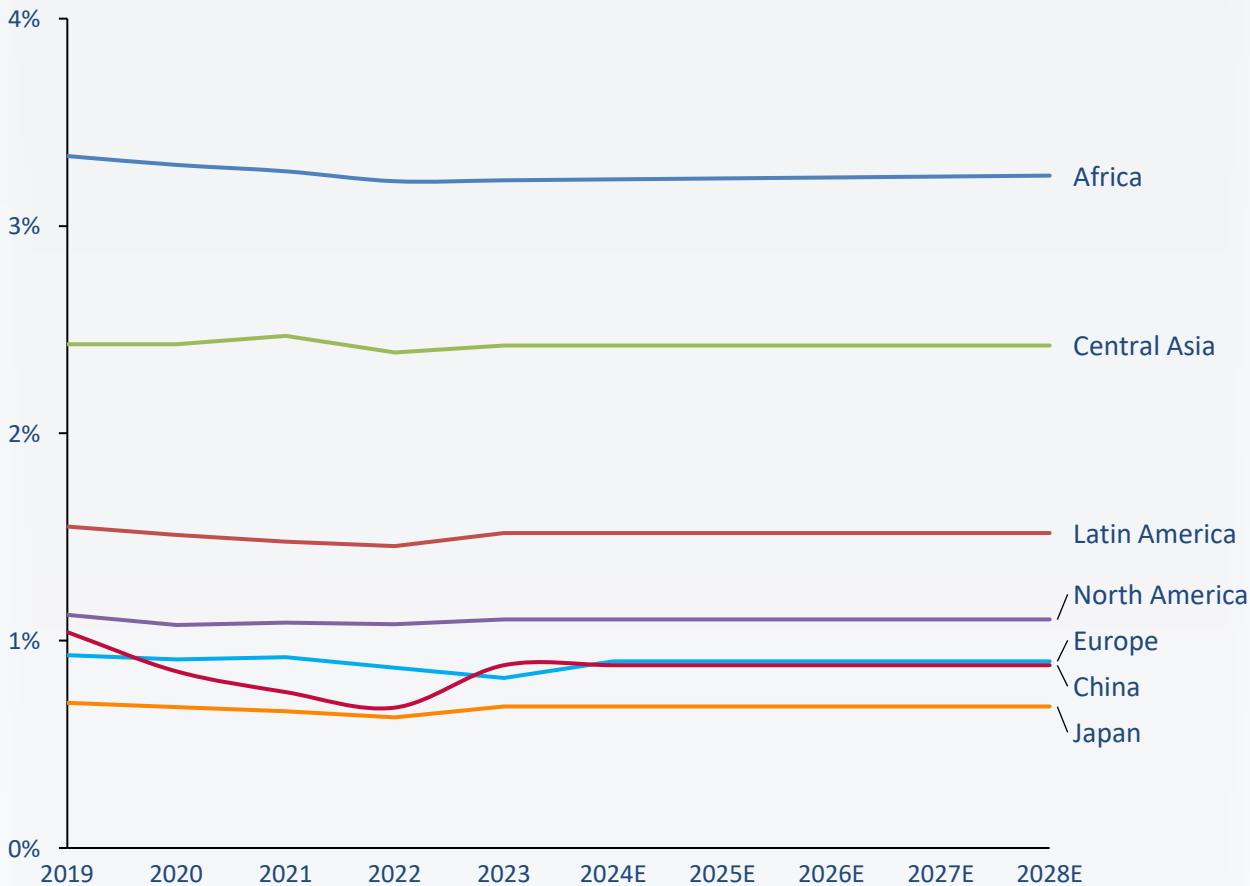
Key Findings

- The population growth rates of Africa, Latin America, and Japan all remained relatively steady from 2019 to 2023, with figures at about 2.5%, 0.7%, and -0.5% respectively, and are expected to maintain this pattern from 2024 to 2028.
- Africa has the highest population growth rates, whereas Japan has the lowest. The main reasons for the population growth in Africa are the high birth rate, improved medical conditions, a young population structure, and the combined effects of social and cultural factors.

Source: Frost & Sullivan

Characteristics of Emerging Markets

Birth Rate in Emerging Markets and Other Markets
%, 2019-2028E

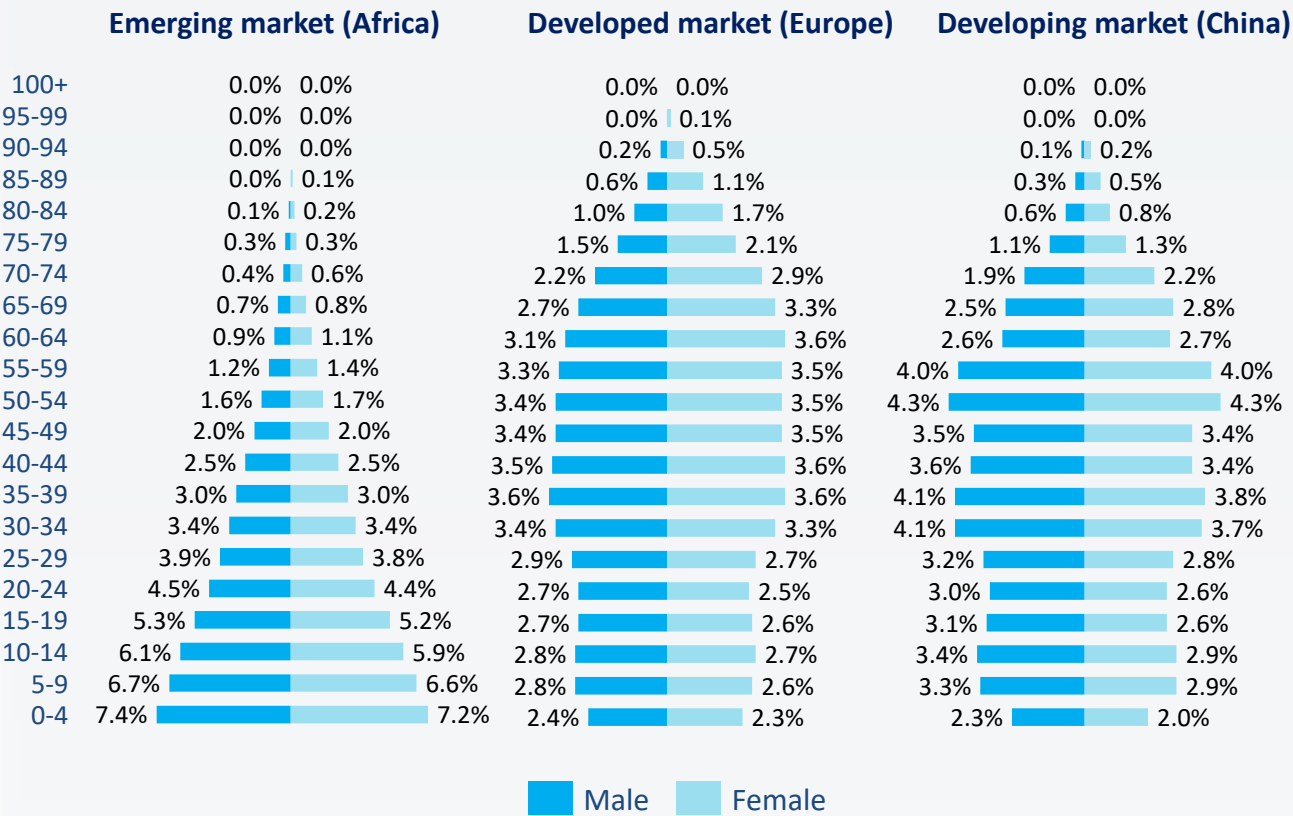


Key Findings

- From 2019 to 2023, most regions experienced a decline in birth rates. China and Europe saw the most significant decreases and North America and Latin America have experienced less pronounced declines. In contrast, Africa, Central Asia and Latin America is the regions that managed to maintain slight growth during the same period.
- Looking ahead, the birth rate forecasts paint a more stabilized picture. While Europe is projected to see a moderate recovery, most other regions are expected to remain relatively flat.

Characteristics of Emerging Markets

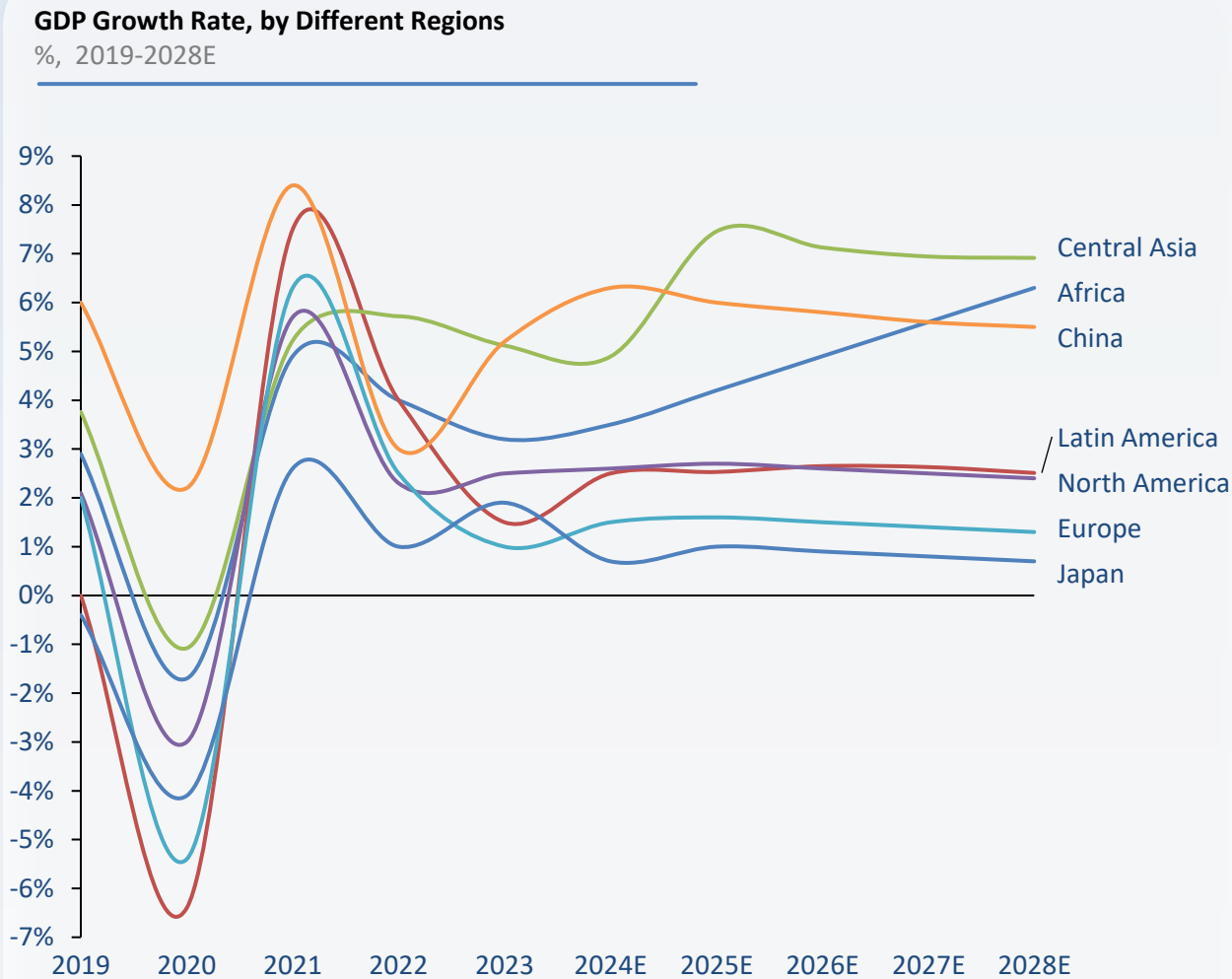
Demographics of Africa, Europe and China %, 2023



Key Findings

- Emerging market has a youthful population with high birth rates and a broad base, ensuring a continuously expanding consumer base and long-term demand for hygiene products.
- While developed market has an aging population with a more evenly distributed structure. Developing market shows a middle-heavy distribution, reflecting past policies and a gradually aging society.

Characteristics of Emerging Markets

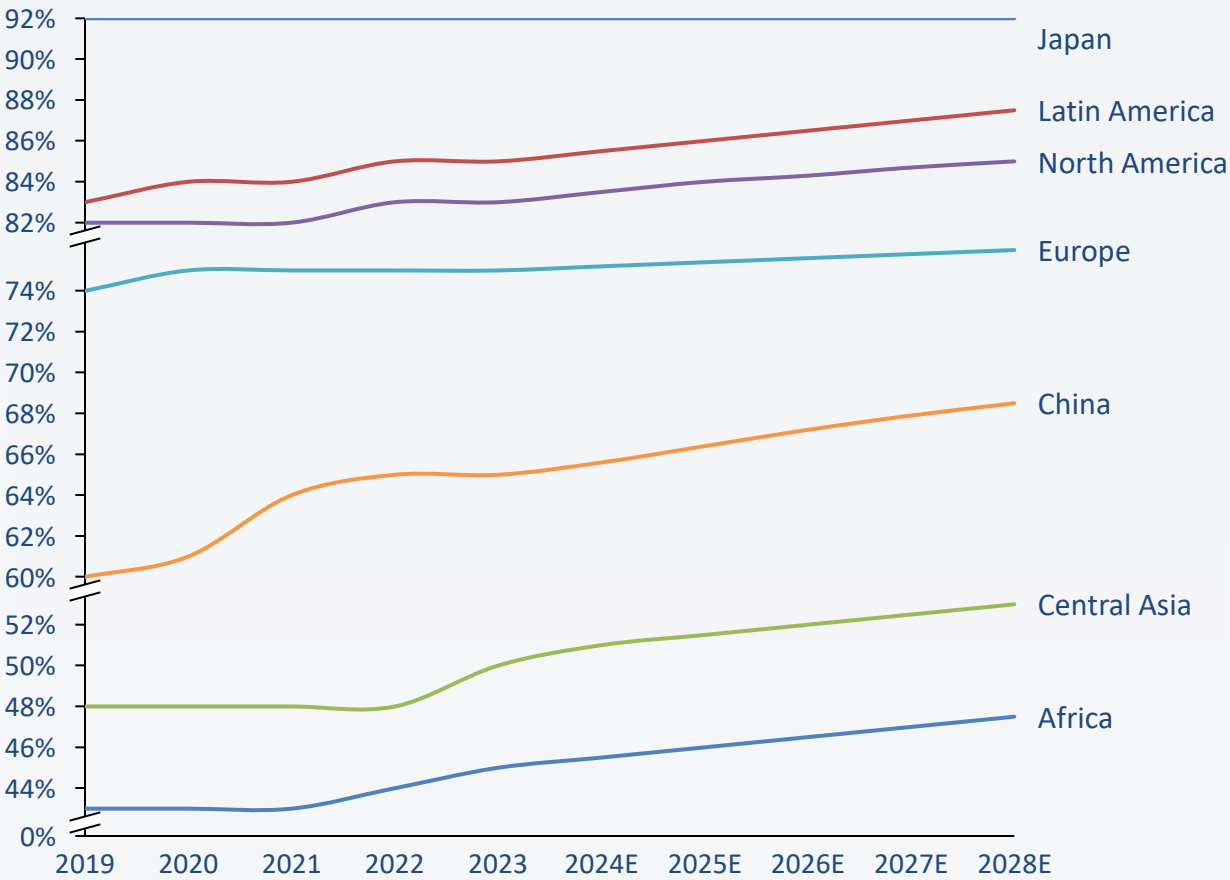


Key Findings

- From 2019 to 2023, the GDP growth rates of all regions fluctuated in similar patterns, ranging from -6.5% to 8.5%.
- In the subsequent period from 2024 to 2028, the GDP growth rates of all regions are projected to show growing trends, with figures ranging from 0.5% to 7%.
- It is noted that from 2019 to 2020, the GDP growth rates of all regions dramatically decreased and reached their lowest point in 2020. Following 2020, the figures for all regions experienced a significant increase, with most reaching their peak levels during this period.

Characteristics of Emerging Markets

Urbanization Rate, by Different Regions
%, 2019-2028E



Key Findings

- Japan has the highest urbanization rates, whereas Africa has the lowest.
- The urbanization rates of Japan have remained unchanged from 2019 to 2023.
- Meanwhile, the urbanization rates of the other six regions all showed growing trends from 2019 to 2023. Emerging markets, in particular, have seen a significant increase in its urbanization rate, which is expected to continue to accelerate in emerging markets after 2024.



Definition and Classification of Hygiene Products in Emerging Markets



Definition

Hygiene Products

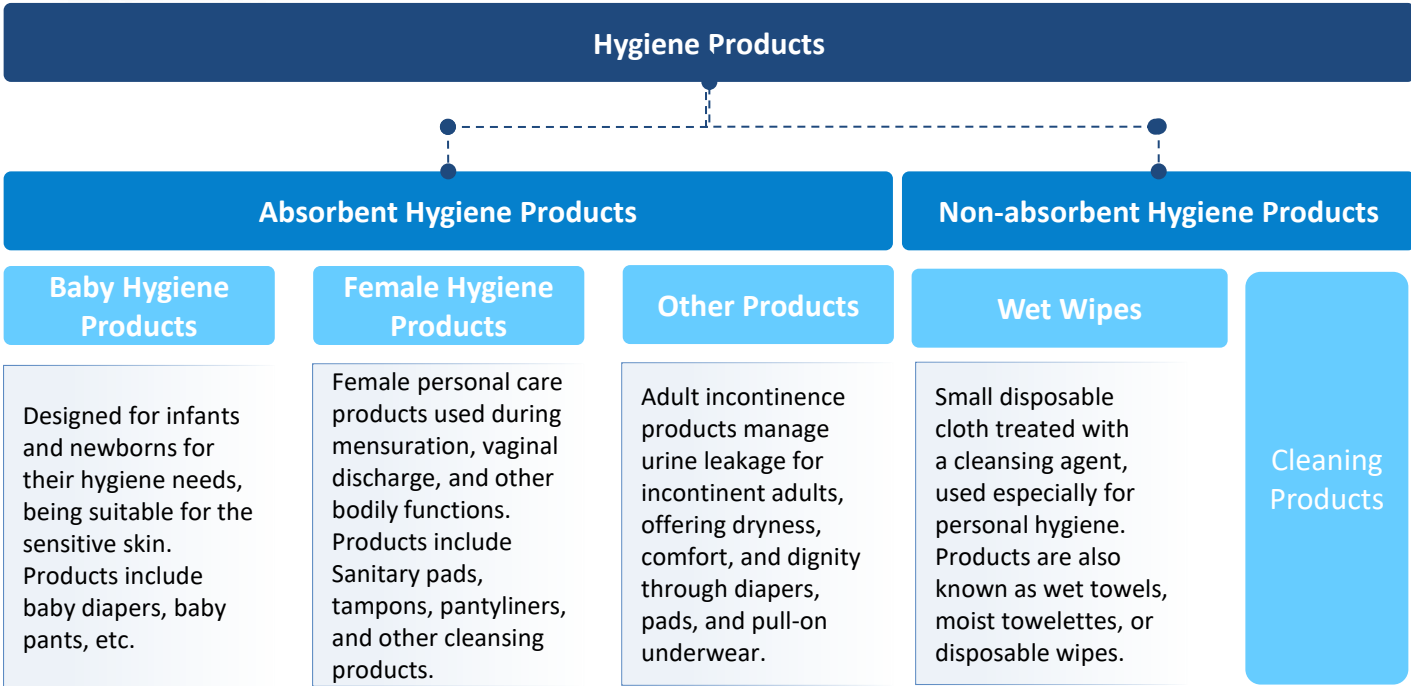
The hygiene product industry in emerging markets involves a range of production and sales activities for hygiene products. Hygiene products refer to various technologically advanced chemical products used in daily life that come into direct or indirect contact with the human body, and are used for physiological and hygiene health care purposes, such as antibacterial or antimicrobial effects.

Absorbent Hygiene Products

Absorbent hygiene products are designed for direct contact with the human body and are primarily made from highly absorbent materials. They are one-time disposable hygiene products used to collect human excretions. The categories mainly include baby hygiene products, female hygiene products and other products.



Classification



Characteristics of Hygiene Products Industry in Emerging Markets

1

Highly Dispersed Population and Sales Network Challenges

- The population in many emerging markets is highly dispersed, particularly in Africa, where rural-urban disparities are significant. This geographic spread presents challenges for companies trying to establish a broad consumer base and distribution network.
- Developing and maintaining a well-established sales network in such regions is a time-intensive process. It often requires years of effort to build relationships with local retailers, wholesalers, and distributors.



2

Offline Purchase Dominance

- In many emerging markets, especially in Africa, offline purchasing remains the dominant mode of consumption. Traditional brick-and-mortar retail channels—such as local shops, small retailers, and wholesalers—are still the primary points of sale for hygiene products. Despite the growth of e-commerce, online shopping is still relatively underdeveloped in many regions.



3

Lower Level of Industrialization

- Emerging markets, especially in Africa and other developing regions, often have a lower level of industrialization compared to developed markets. This can impact the production and availability of hygiene products, as local manufacturing capabilities are still in the process of developing.
- The lower industrialization levels in these regions are compounded by the lack of adequate infrastructure, such as transportation and logistics networks, and inconsistent supply chain systems. In this context, companies with the ability to enter and establish operations in these markets early can gain a significant first-mover advantage.



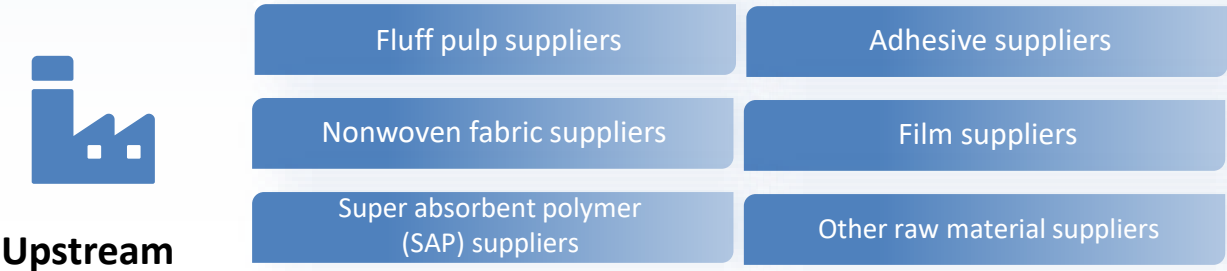
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Rural-Urban Disparities and Multi-layered Sales Channels

- Due to the underdeveloped transportation network and significant rural-urban disparities, consumer products often pass through multiple layers of sales networks before reaching the end consumer. In rural areas, hygiene products may need to travel through several intermediaries, such as regional distributors and local retailers, before they are made available to consumers.

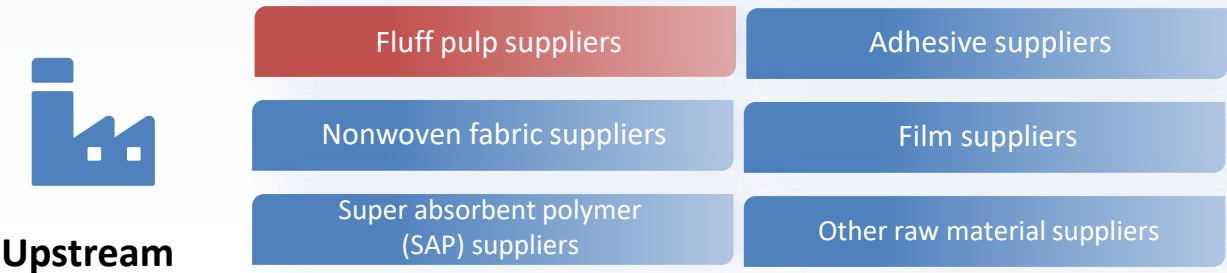


Industry Value Chain Analysis of Hygiene Product in Emerging Markets



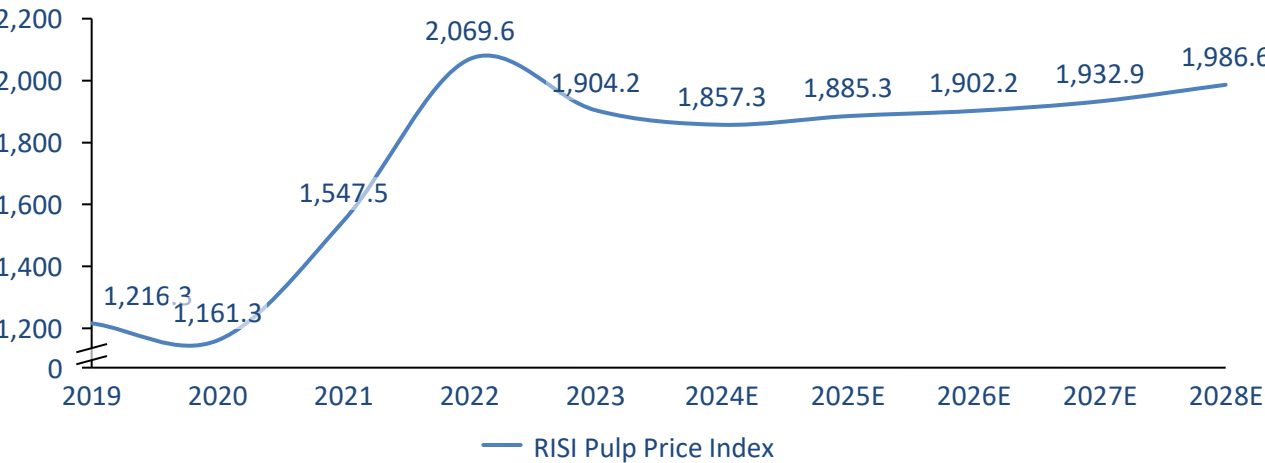
- **With technological advancements, nonwoven fabric, polymeric superabsorbent resin and fluff pulp have become mainstream raw materials.** Suppliers of nonwoven fabric and super absorbent polymer are concentrated in East Asian countries such as China, Japan and German, while fluff pulp suppliers are concentrated in the United States. The importance of supply chain stability has been increasingly emphasized, and localized supply of raw materials such as non-woven fabric and polymeric superabsorbent resin plays a key role in improving supply chain stability.
- The economies of scale and cost advantages of upstream raw material production have a crucial impact on reducing production costs for midstream companies.
- Supply chain stability is an essential factor in ensuring stable production for midstream companies. Midstream companies that have stable upstream raw material supply, especially during global emergencies, possess a competitive advantage.
- **Key success factor:** Timely adjustment of raw material supply based on local market demand for product quantity and quality is crucial for midstream companies to maintain their competitive strength.

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



RISI Pulp Price Index*
2019-2028E

CAGR 2019-2023	CAGR 2023-2028E
11.9%	0.9%

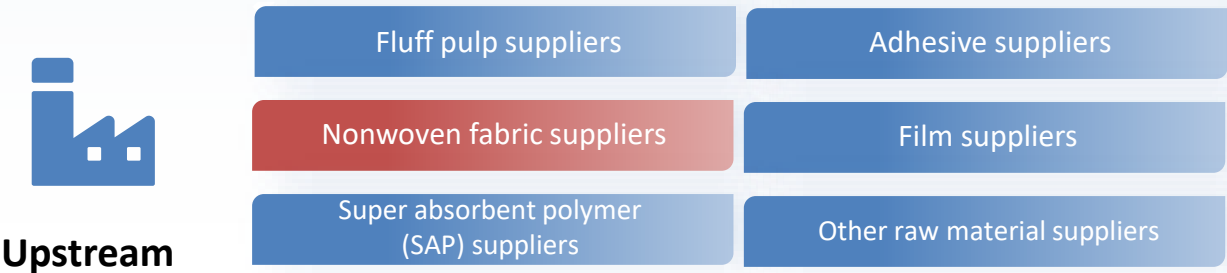


Key Findings

- The rise of fluff pulp price to a peak in 2022 was mainly caused by multiple factors such as supply chain bottlenecks, the Russia - Ukraine conflict leading to increased energy costs, restricted production in major producing countries, and a rebound in global demand. In addition, the pandemic was nearing its end in 2022, and the Chinese economy recovered. The demand for e-commerce and express delivery surged, which in turn drove up the demand for cardboard packaging and increased the demand for fluff pulp, becoming an important factor in the price increase.
- *The RISI Pulp Price Index is a pulp price index published by RISI (Resource Information Systems, Inc.), used to measure price changes in the global pulp market. RISI is a company specializing in market information related to wood and pulp, providing market data, price trends, and analysis on wood, paper, and related products. This index is widely used to track fluctuations in pulp prices (particularly paper pulp), helping industry participants understand market dynamics.

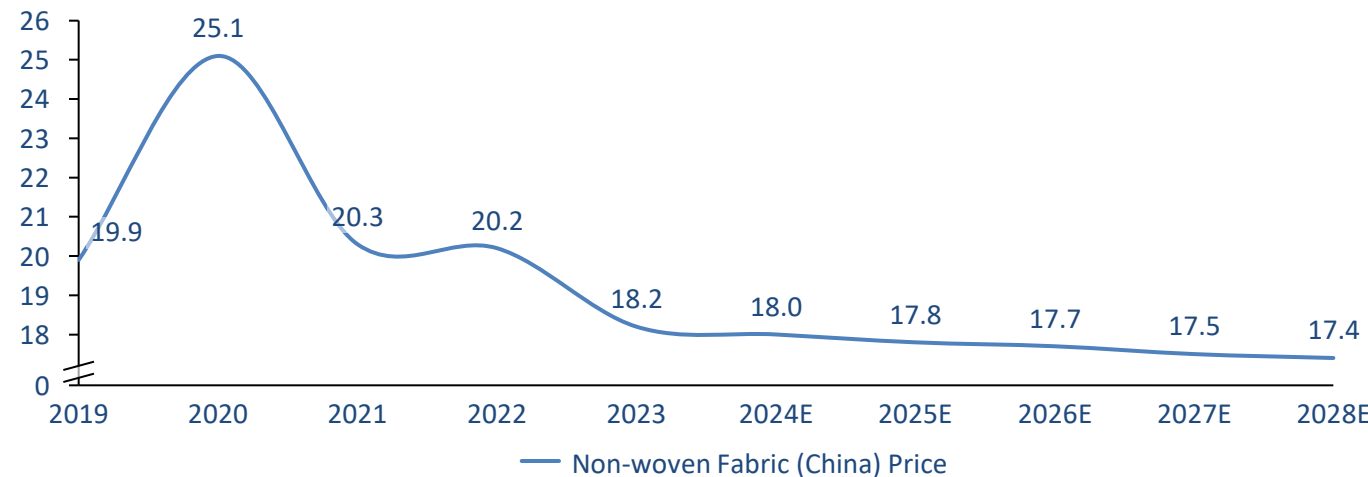
Source: Frost & Sullivan

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



Non-woven Fabric (China) Price
RMB/Kg, 2019-2028E

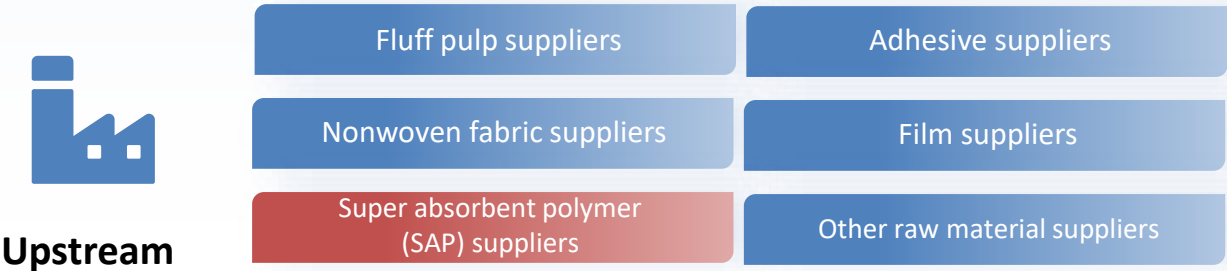
CAGR 2019-2023	CAGR 2023-2028E
-2.2%	-0.9%



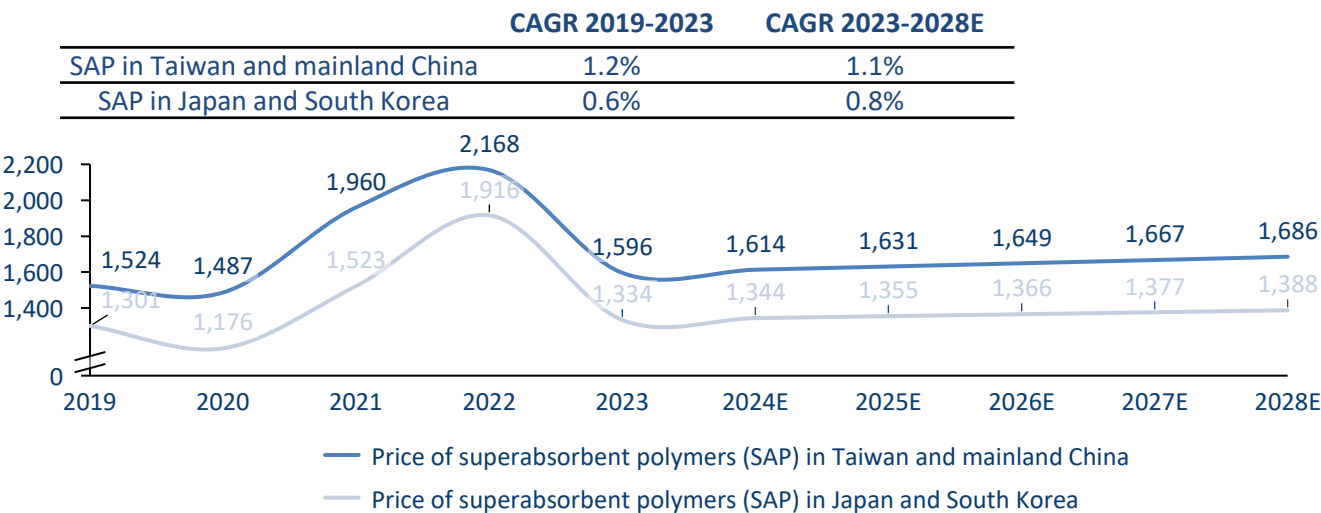
Key Findings

- Non-woven fabric is a key raw material for making hygiene products such as sanitary pads and baby diapers. It has excellent hygiene, comfort, moisture absorption, and breathability properties, which help hygiene products effectively absorb liquids such as urine and menstrual blood.
- From 2019 to 2023, the price of non-woven fabric in China experienced significant fluctuations. The outbreak of the COVID-19 pandemic in early 2020 led to a surge in demand for masks, resulting in a supply shortage of non-woven fabric. As production capacity expanded in 2021, non-woven price declined. And with the end of the pandemic and a sharp decline in non-woven exports in 2023, China’s domestic nonwoven price showed a sharp decrease. Currently, the supply of non-woven fabric exceeds demand, and it is expected that the price will continue to decrease at a CAGR of -0.9% from 2023 to 2028.

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



Price fluctuations of Super Absorbent Polymer (FOB Price)*
USD/Ton, 2019-2028E



Key Findings

- The average market price of super absorbent polymers (SAP) fluctuates significantly due to downstream purchasing demand and the upstream acrylic acid market, with prices rising sharply across the board in 2022 and then falling back quickly to a lower point in 2023, with an average market price of USD1,596 per ton in 2023 in Taiwan and China, and an average SAP market price of USD1,334 per ton in Japan and South Korea. SAP prices are expected to grow relatively steadily over the next five years.
- * The price of superabsorbent polymers (SAP) in China is relatively higher compared to Japan and South Korea, influenced by various factors such as: 1.Demand from the agricultural and pharmaceutical industries: China, being an agricultural powerhouse, has a large demand for SAP for purposes such as soil improvement and water retention, driving up the price of SAP. Additionally, the expanding pharmaceutical market in China has increased the demand for raw materials such as SAP, further contributing to the higher prices of SAP in China. 2. Disparities in production capacity: While China's production capacity for superabsorbent polymers is continuously improving, there still exists a gap when compared to countries like Japan and South Korea. Japan and South Korea have more mature production technologies and processes for SAP, enabling them to mass-produce high-quality SAP products. China, having developed in this area relatively later, lags behind in production efficiency and cost control compared to Japan and South Korea, resulting in higher SAP prices.

Source: Frost & Sullivan

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



Midstream

- Companies can be categorized based on their scope of operations, including international company, local company, trading company and multinational company. Each type of company plays a distinct role in the global business landscape, depending on their market reach and operational focus.

	Definition	Strengths & Weakness
International Company	<ul style="list-style-type: none">• Operates on a global scale with presence in multiple continents.• Large-scale production and sales networks globally.	<ul style="list-style-type: none">• Strong financial resources, advanced production technologies, and trusted global brand.• Neglect of smaller markets, and higher market volatility sensitivity.
Local Company	<ul style="list-style-type: none">• Operates primarily within the country or region of origin.• Small to medium-scale production, catering to local markets.	<ul style="list-style-type: none">• Consumer insights, local identity and trust.• Smaller scale of operations, and inefficiencies.
Trading Company	<ul style="list-style-type: none">• Primarily engages in the import, export, and distribution of products. This type of company focuses on sourcing and distributing products.	<ul style="list-style-type: none">• Cost advantage.• Limited brand awareness, inconsistent product quality, and weak channel management.
Multinational Company	<ul style="list-style-type: none">• Operates in multiple countries with a strong focus on a specific region, often tailoring to the unique demands of the market.	<ul style="list-style-type: none">• Combines local market knowledge with global best practices, and strong supply chain integration ability.• Needs to maintain consistency while adapting to local market nuances.

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



Midstream

- Companies can be categorized based on their scope of operations, including international company, local company, trading company and multinational company. Each type of company plays a distinct role in the global business landscape, depending on their market reach and operational focus.

Main Palyers in African Market :

Number of Local Hygiene Factories in Africa, 2023

Softcare          8

P&G       6

* Kimberly-Clark    3



Note: The local hygiene factories are the ones that operate normally and manufacture baby diapers and sanitary pads products on a regular basis.

Industry Value Chain Analysis of Hygiene Product in Emerging Markets

Main Palyers in African Market



Softcare

The development of Softcare can be traced back to the international trading of hygieneproducts by Sunda Group in 2009. Headquartered in Dubai, UAE, Softcare is a global corporation specializing in the development, manufacturing, and sales of hygiene products, including baby diapers, baby pants, sanitary pads, and wet wipes. The company focuses on the rapidly expanding emerging markets of Africa, Latin America, and Central Asia.



Proctor & Gamble

Founded in 1837 and headquartered in the U.S., P&G is a globally recognized multinational FMCG company and one of the world's largest producers of household goods, selling its products in more than 180 countries and territories, and employing approximately 110,000 people worldwide. Listed on the NYSE, P&G is included in the Dow Jones Industrial Average and the S&P 500, and has been named to the Fortune 500 for consecutive years.



Kimberly-Clark

Founded in 1872 and headquartered in the U.S., Kimberly-Clark is the world's second-largest manufacturer of household and personal care products and the world's largest producer of tissue paper. Listed on the NYSE and a constituent of the S&P 500, the company operates manufacturing facilities in nearly 35 countries, sells its products in more than 175 countries, and employs more than 42,000 people, and has been listed on the list of Fortune 500 for consecutive years.

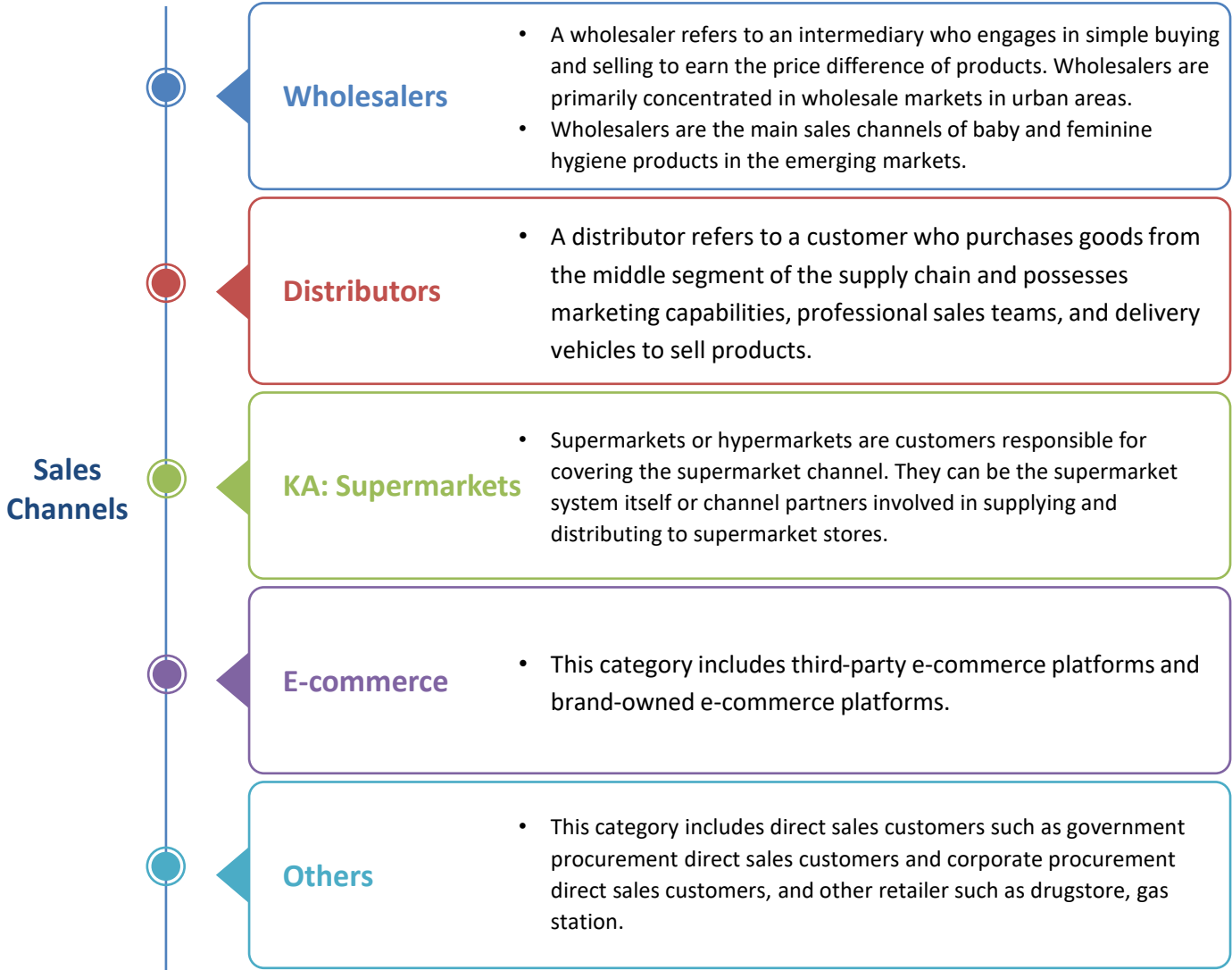
Source: Frost & Sullivan

Industry Value Chain Analysis of Hygiene Product in Emerging Markets



Downstream

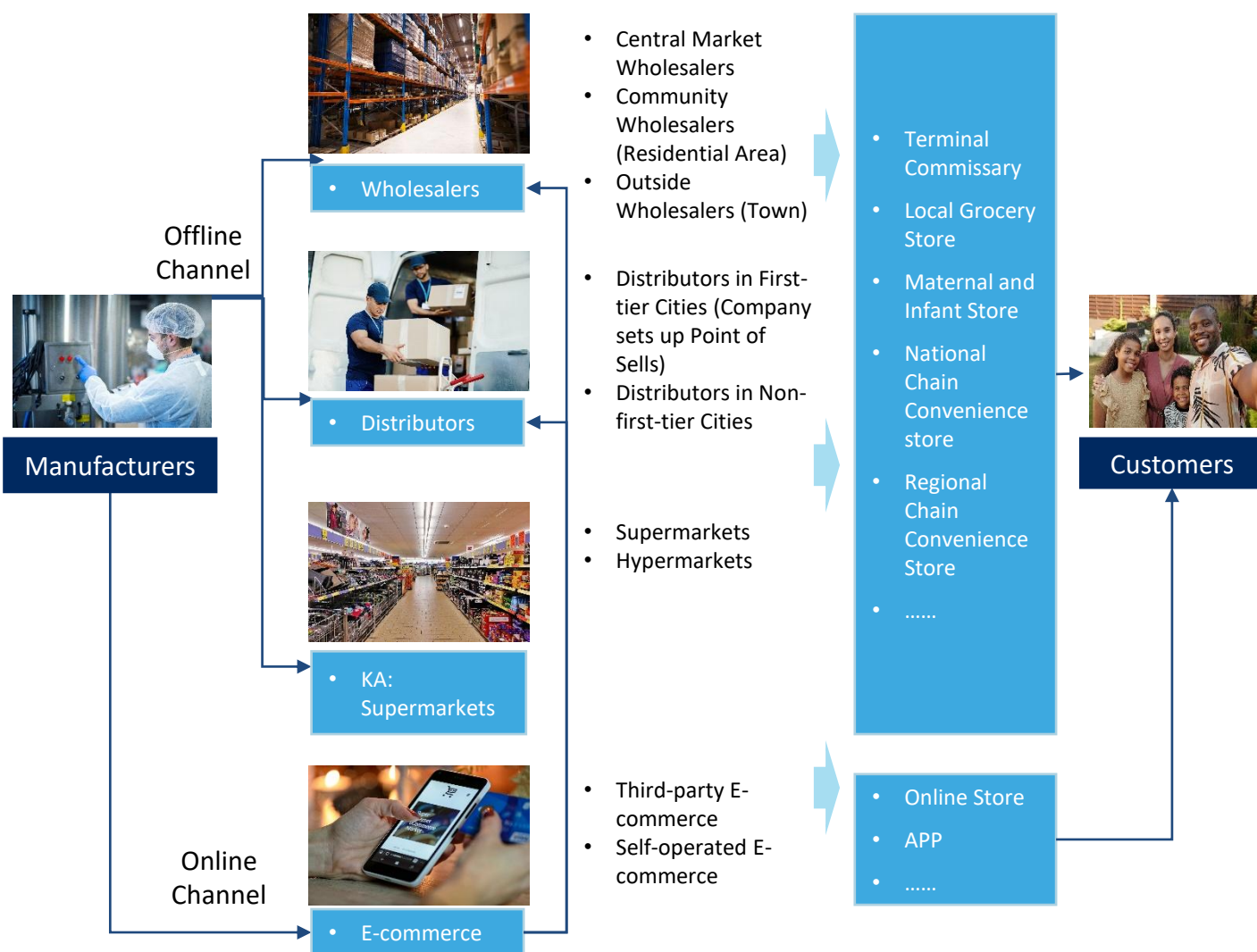
- Sales channels include wholesalers, distributors, KA supermarket, E-commerce, and other channels. Within which the wholesalers and distributors are the main channels in emerging markets due to fragmented national networks, limited E-commerce development and logistics constraints.





Downstream

Industry Value Chain Analysis of Hygiene Product in Emerging Markets

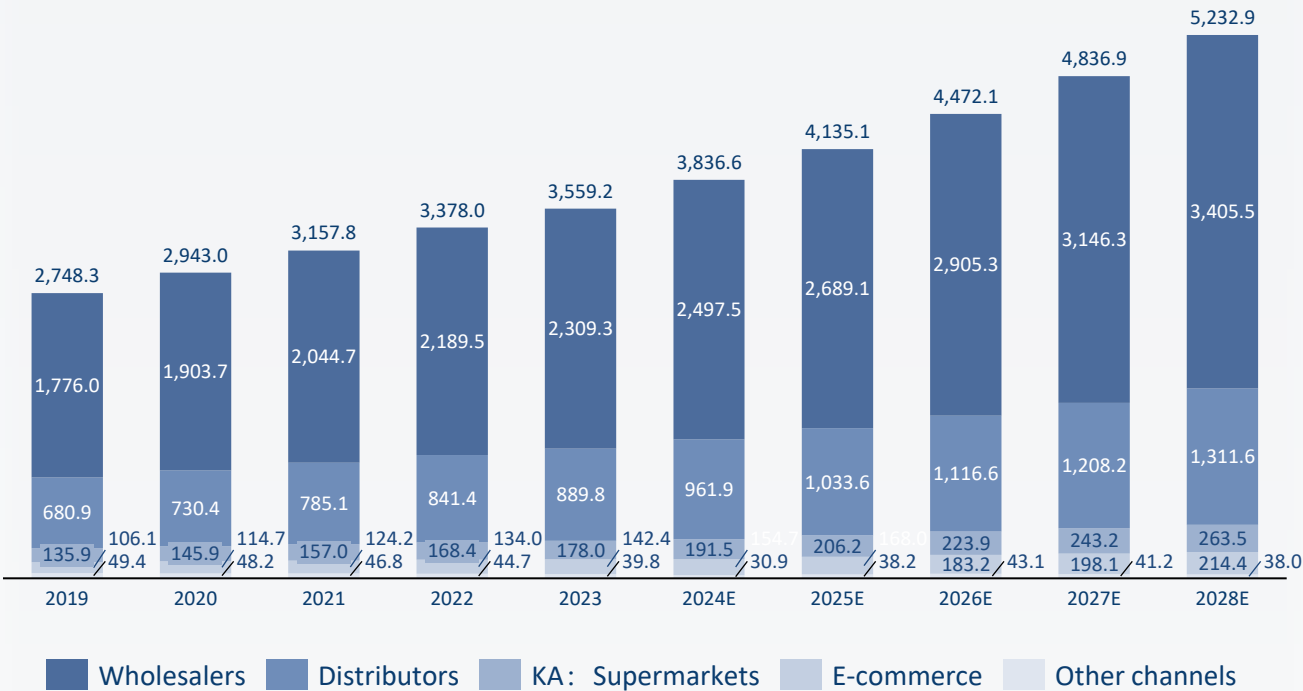


Market Size by Different Sales Channels

Market Size of Baby Diapers and Baby Pants, Sanitary Pads in Africa, by Different Sales Channel

USD Million, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Wholesalers	6.8%	8.1%
Distributors	6.9%	8.1%
KA: Supermarkets	7.0%	8.2%
E-commerce	7.6%	8.5%



Key Findings

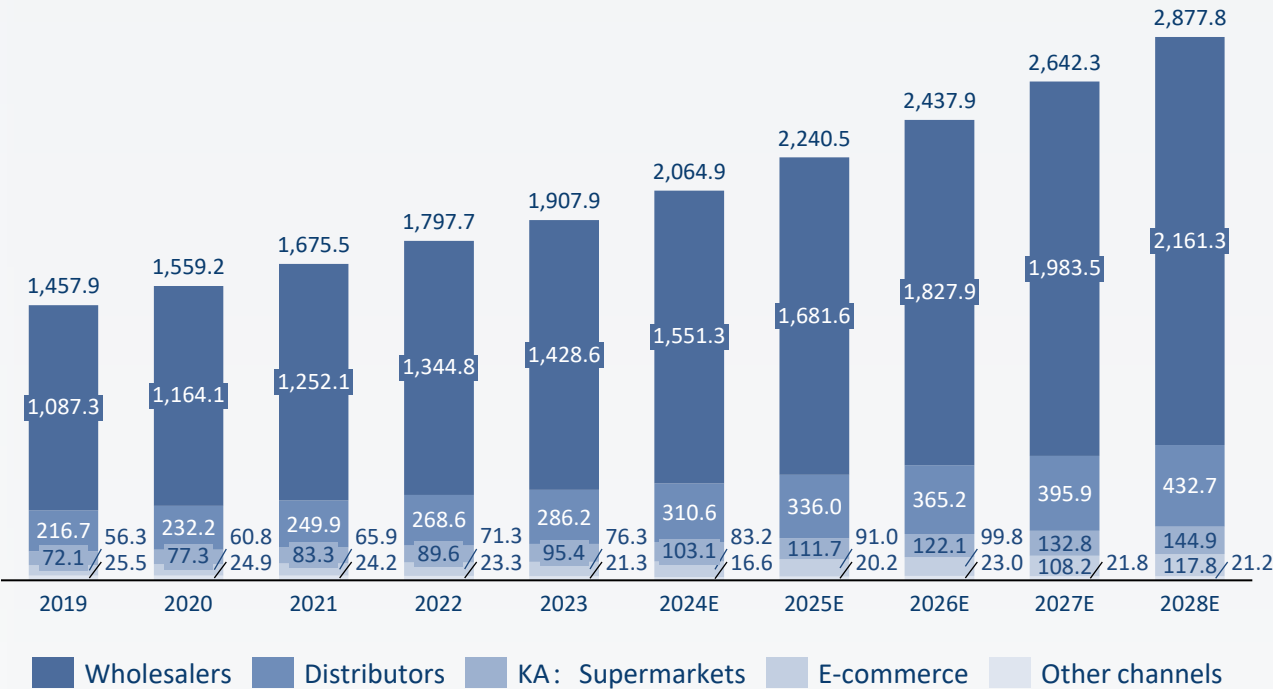
- In emerging markets, the sales channels are predominantly structured around wholesalers, followed by distributors. This system is primarily driven by a combination of logistical challenges, limited infrastructure, and the lower penetration of digital and e-commerce solutions compared to more developed economies.
- Sales channel integration becomes a crucial success factor for local businesses in emerging markets, offering the flexibility and agility required to address the region's infrastructure challenges and complex consumer behavior.

Market Size by Different Sales Channels

Market Size of Baby Diapers and Baby Pants, Sanitary Pads in Western Africa, Middle Africa and Eastern Africa, by Different Sales Channel

USD Million, 2019-2028E

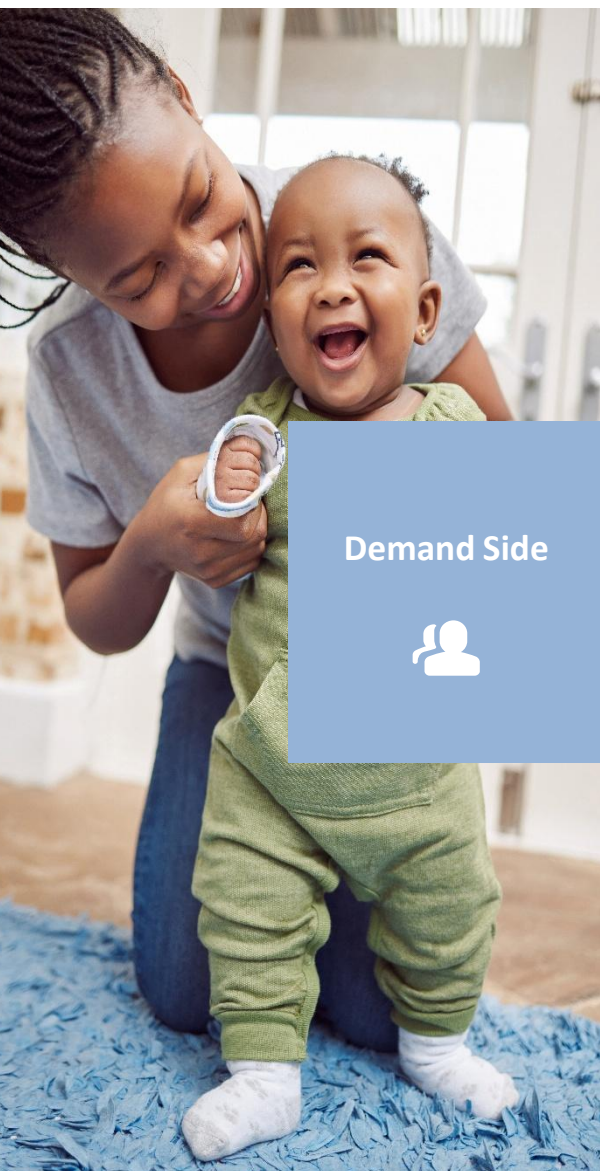
	CAGR 2019-2023	CAGR 2023-2028E
Wholesalers	7.1%	8.6%
Distributors	7.2%	8.6%
KA: Supermarkets	7.2%	8.7%
E-commerce	7.9%	9.1%



Key Findings

- In regions like Western Africa, Middle Africa, and Eastern Africa, wholesalers and distributors play a more prominent role compared to the broader African market. This is largely due to the unique challenges these regions face, including logistical hurdles, underdeveloped infrastructure, and slower adoption of digital and e-commerce solutions. The reliance on wholesalers and distributors in these areas enables businesses to overcome local constraints and reach consumers effectively. As such, sales channel integration remains critical for success, offering the necessary flexibility to navigate the complexities of consumer behavior and regional infrastructure limitations.

Driving Factors for Emerging Market Hygiene Product Industry



1 High Birth Rate

Due to high birth rates in emerging markets, population growth expands the consumer base for the hygiene product industry, driving demand for essential items. The rising number of newborns further increases the need for infant-related hygiene products like baby diapers, wipes, and toiletries. Even if average consumption per consumer remains steady, the overall sales volume grows with the expanding population.

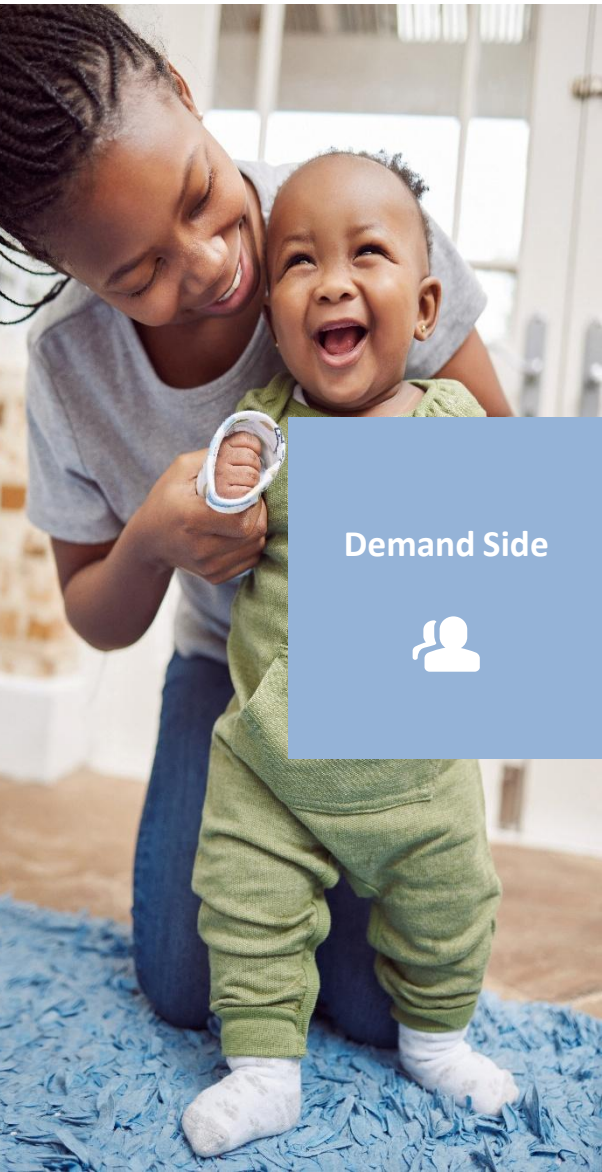
2 Gradual Demographic Rejuvenation

Emerging markets have a younger population, driving demand for hygiene products. They prioritize health and personal care, creating more diversified needs. This group is also open to trying new products and brands, pushing companies to innovate in product development and marketing strategies.

3 Increased Income Levels, Upgraded Consumption of Sanitary Products

As emerging market economies grow, rising per capita income boosts demand for hygiene products as consumers seek higher quality of life. With increased consumption, consumers also prioritize personalized products, attractive packaging, and sustainability standards.

Driving Factors for Emerging Market Hygiene Product Industry



4 Accelerated Urbanization

Urbanization drives demand for convenient, high-quality hygiene products as incomes rise. Consumers prioritize quality, brand reputation, and safety, prompting companies to focus on products that meet urban needs while maintaining high standards.

5 Changing Perceptions of Hygiene Products Usage

As education levels rise and health awareness spreads, consumers increasingly prioritize personal hygiene and health products. They are more discerning about ingredients and manufacturing processes. This shift drives companies to improve formulations, focusing on transparency and sustainability in product development.

6 Enhancing Recognition of Local Brands

Local brands must adjust their image, products, and marketing strategies to align with local culture, customs, and consumer preferences. This helps build recognition and trust, increasing market share in emerging markets.

7 Accelerated Industrialization and Local Manufacturing

Local manufacturing reduces costs, lowers transportation and import fees, and strengthens supply chains, improving resilience and product availability. Shorter lead times boost market adaptability.

Driving Factors for Emerging Market Hygiene Product Industry



1 Continuous Improvement in Product Innovation

The application of new technologies and innovative product design can meet new consumer needs, enhance user experience, and drive industry growth. With the development of new materials, materials with high absorption, high permeability and low sensitization are applied to product manufacturing, which improves the user experience of consumers. Advances in biotechnology enable the hygiene industry to develop new effective ingredients, and products developed using these new technologies can promote consumer purchases through effective marketing strategies.

2 Advancement of Globalization

The advancement of globalization, characterized by the entry of international brands and the expansion of local brands, has spurred market competition and driven overall industry development. The entry of international brands has expanded product choices, catering to diverse consumer needs. Simultaneously, local brands, by understanding the unique needs and preferences of local consumers, offer more tailored products, increasing market diversity. Competing with international brands, local brands are expanding their market reach, advancing towards broader international markets.

Driving Factors for Emerging Market Hygiene Product Industry



3 Maturity of the Global Supply Chain

A refined global supply chain helps emerging market players integrate resources, reduce costs, and improve efficiency, allowing hygiene companies to offer high-quality, competitively priced products. It also fosters international cooperation, providing more opportunities and partnerships.

4 Maturity of Talent Supply

Enhanced education systems and talent development have equipped emerging markets with skilled and knowledgeable professionals, meeting the hygiene industry's needs. These talents boost production efficiency and product quality and drive innovation within the industry, crucial for maintaining competitiveness in a dynamic and evolving sector.

5 Continued Maturation of Online and Offline Channels

Improved infrastructure in emerging markets, including better transportation and logistics, enables more efficient delivery of hygiene products. The expansion of retail stores enhances shopping experiences, boosting demand. While Africa's online shopping is nascent, online markets in Central Asia and South America are growing, and the integration of online and offline channels drives market growth.

Driving Factors for Emerging Market Hygiene Product Industry

Policy Side



Release Date	Issuing Authority	Policy	Content
2024	African Development Bank Group	African Economic Outlook 2024	The theme of the 2024 African Economic Outlook is Driving Africa’s Transformation: The Reform of the Global Financial Architecture. The African Economic Outlook 2024 reports a challenging environment with a GDP growth slowdown to 3.1% in 2023 due to factors like geopolitical tensions and climate issues, but forecasts an improvement to 4.3% by 2025. Despite resilience, Africa faces hurdles in achieving sustainable transformation, with economies dependent on low-productivity sectors. Addressing this requires strategic investments in education, technology, and infrastructure, with a financing need of \$402 billion annually. The report emphasizes the necessity of reforming global financial systems to support Africa's development through fair and sustainable resource allocation.
2024	Africa Strategy 2024-2025	United Nations Global Compact	This strategy aims to accelerate and scale the impact of African businesses by promoting corporate sustainability and ethical business practices. It focuses on key areas such as climate and environment, labor and decent work, gender equality, sustainable finance, and peace and justice. The strategy also supports initiatives like the Africa Business Leaders Coalition (ABLC) and the Global Africa Business Initiative (GABI) to drive inclusive impact.
2024	FACT SHEET: Celebrating U.S.-Africa Partnership Two Years After the 2022 U.S.-Africa Leaders Summit	U.S. Government	The FACT SHEET: Celebrating U.S.-Africa Partnership Two Years After the 2022 U.S.-Africa Leaders Summit highlights the U.S.'s progress in supporting Africa through over \$65 billion in investments, exceeding the initial \$55 billion goal. Key initiatives include empowering women entrepreneurs, promoting clean energy participation, enhancing food security, and strengthening health systems. The partnership also focuses on engaging the African diaspora and combating gender-based violence, demonstrating a commitment to sustainable development, economic growth, and gender equality.

Driving Factors for Emerging Market Hygiene Product Industry

Policy Side



Release Date	Issuing Authority	Policy	Content
2023	United Nations Development Programme	Africa Sustainable Development Report 2022	The Africa Sustainable Development Report 2022 examines Africa's progress towards the Sustainable Development Goals in the wake of the COVID-19 pandemic and the Russia-Ukraine crisis. It identifies sub-regional policy solutions to address structural weaknesses and enhance resilience to external shocks. The report emphasizes the need for inclusive green growth, improved governance, social protection, and digital transformation to accelerate sustainable development. It also highlights the importance of regional cooperation and capacity-building to mitigate the impact of external shocks and achieve the SDGs.
2025	Economist Impact	Policy Content of Trade in Transition 2025: Africa Regional Insights	The Trade in Transition 2025: Africa Regional Insights report provides a comprehensive analysis of Africa's future trade landscape. It underscores the potential of the African Continental Free Trade Area to boost intra-African trade and promote economic integration. The report highlights the importance of industrialization and value-added exports to reduce reliance on raw material exports, as well as the need for infrastructure development to enhance trade capabilities. It also emphasizes the significance of sustainable practices and policy support to address climate change challenges and meet international regulations like the EU's Carbon Border Adjustment Mechanism. Additionally, the report notes Africa's efforts to diversify global trade partnerships beyond traditional ones, such as with China, to include emerging economies like India, the UAE, and Turkey.
2024	Government of Ghana	Ghana Economic Diplomacy and Industrialization	Ghana is deploying trade attachés to key diplomatic missions to aggressively market the country's trade and investment potential. This includes attracting foreign direct investment (FDI), promoting Ghanaian products, and facilitating international business partnerships. The strategy aims to enhance Ghana's global competitiveness and stimulate economic activity across priority sectors.

Driving Factors for Emerging Market Hygiene Product Industry

Policy Side



Release Date	Issuing Authority	Policy	Content
2023	Government of Kenya	Big Four Agenda	The Big Four Agenda prioritizes manufacturing, food security, affordable housing, and healthcare. The government aims to increase local manufacturing capacity, attract foreign investment, and develop special economic zones to boost industrial output.
2023	Government of Rwanda	Made in Rwanda Policy	The policy aims to promote local manufacturing and reduce imports. It includes incentives for investors in priority sectors such as textiles, agro-processing, and technology. The government is also focusing on improving the business environment and enhancing regional trade.
2024	Ethiopian Investment Commission	Ethiopia Industrial Parks Development	Ethiopia continues to develop industrial parks to attract foreign investment and create jobs. The parks focus on labor-intensive industries such as textiles, leather goods, and agro-processing. The government is also investing in infrastructure and improving access to energy.
2023	Government of The Gambia	Green-Focused National Development Plan	The Gambia launched a green-focused national development plan aimed at expanding the private sector by 2027. The plan leverages the country's comparative advantages in agriculture, manufacturing, and ICT. The government is also streamlining bureaucracy and providing tax incentives in priority sectors.
2023	Government of Ghana	Ghana Economic Diplomacy and Industrialization	Ghana is deploying trade attachés to key diplomatic missions to aggressively market the country's trade and investment potential. This includes attracting foreign direct investment (FDI), promoting Ghanaian products, and facilitating international business partnerships. The strategy aims to enhance Ghana's global competitiveness and stimulate economic activity across priority sectors.

Entry Barriers for Emerging Market Hygiene Product Industry

Entry Barriers



1 Production Localization Capacity

In emerging markets, populations are often dispersed, with most countries having smaller populations spread across large areas. This grid-like distribution and high mobility complicate business promotion and product penetration. Lower average education levels may also affect workforce management, leading to higher operational costs and greater demands on corporate management. International companies struggle to leverage economies of scale in such environments, making it crucial for companies to adapt local production strategies to population and education factors.

2 Quality Control Capacity

In the hygiene product industry, product quality is one of the key factors that influence brand reputation. Leading brands often establish strict quality control standards and processes that ensure stable and reliable product quality. The primary aspect of quality control is ensuring that raw materials meet production standards, which includes stringent supplier selections and long-term inspection. Secondly, using advanced production technology and equipment also helps control product quality. Stable and reliable product quality can earn consumer trust and enable companies to maintain long-term market competitiveness.

Entry Barriers for Emerging Market Hygiene Product Industry

Entry Barriers



3 Supply Chain Integration Ability

Global supply chain enables businesses to source raw materials from lower-cost regions, partnering with multiple suppliers to ensure a steady supply and improve production efficiency while controlling costs. It also allows for flexible adjustments based on market demand, enhancing supply chain resilience. A stable raw material supply chain and high-quality sources serve as key industry entry barriers. Effective supply chain management ensures stable production and timely delivery, which are vital for building reputation and customer trust.

4 Sales Channel Access Complexity

Hygiene products, as fast-moving consumer goods (FMCG), rely heavily on sales channels for success. New entrants in the market face a significant challenge if they can't access local distributor resources. Local distributors are key in connecting manufacturers with retailers and consumers, thanks to their established networks, relationships, and logistical capabilities. Without these resources, new entrants struggle to get their products to market, hindering their ability to compete with established brands that already have strong distributor ties and reliable sales networks.

Entry Barriers for Emerging Market Hygiene Product Industry

Entry Barriers



5 Digital Management Capacity Barrier

In a competitive market, efficient digital management capabilities are crucial. This includes investing in advanced software, hardware, and employee training to effectively use these technologies. New entrants must make significant initial investments in digital tools. Additionally, digital management enables quick adaptation to market changes, requiring strong data analysis and flexible systems for market insights and customer service. By leveraging digital management to track market dynamics and consumer behavior, companies can respond swiftly and offer more suitable products, enhancing their competitiveness.

6 Organizational and Managerial Capacity

In emerging markets, strong organizational and management capabilities are essential for smooth internal operations, covering production, HR, and financial management. Ensuring stable production requires efficient recruitment and staff training. As businesses expand internationally, adapting to local financial and tax systems, managing foreign exchange, and handling cross-border capital flows become critical. Cross-cultural management and international business experience are key for success, especially in transnational operations. New entrants often struggle to establish effective organizational structures and management systems in a short time.

Entry Barriers for Emerging Market Hygiene Product Industry

Entry Barriers



7 Commercialization Integration Capacity

In emerging markets, understanding local consumer needs and transforming those insights into products and strategies is key. This helps with defining product positioning and implementing differentiation to stand out. Building brand recognition is essential for gaining trust, while market share is closely tied to effective multi-channel marketing and smart pricing strategies. Leading brands have strong commercial integration capabilities in marketing, channel sales, and pricing, making it difficult for new entrants to quickly replicate in these areas.

8 Tariff Cost

The hygiene product industry may face challenges from tariff costs, which can affect new entrants lacking experience and resources to manage customs relationships and import taxes. Tariff escalation and quota systems could also pose additional trade barriers, complicating market entry for newcomers.

9 Funding Barrier

Entering the hygiene product industry in emerging markets requires significant capital investment for production sites, marketing, and channel expansion. Insufficient funds can be a major barrier to entry in the industry.

Entry Barriers for Emerging Market Hygiene Product Industry

Entry Barriers



10 Brand Barrier

Brand plays a key role in the hygiene product industry's growth in emerging markets. Building a strong brand image and recognition requires time, effort, and capital investment. This involves advertising campaigns and creating a positive enterprise image through multiple channels, including internet, social media, and traditional media.

11 Policy and Regulation Awareness and Government-Enterprise Relation

Emerging markets often have policy and regulatory restrictions, including tariffs, quotas, and quality requirements. Companies must stay informed and comply with local regulations in a dynamic political environment. Adjusting investment strategies and operational models in response to policy changes is essential to avoid negative impacts.

12 Capacity to Participate in Industry Standard-Making

In emerging markets, industry regulations and standards often need to evolve toward more efficiency and standardization. By participating in the creation of industry rules, established businesses can influence the industry's healthy development. New entrants find it difficult to influence rule-making, making it challenging to navigate government regulations and maintain a competitive edge.



Chapter 2

Status Quo and Competitive Landscape of the
Baby Diapers and Baby Pants Industry in Emerging Markets

Industry Value of Baby Diapers and Baby Pants Products in Emerging Markets

For Consumer



1 Improved Comfort for Infants and Toddlers

High-quality diapers offer longer-lasting dryness and protection, reducing the risk of diaper rash and skin issues. They use highly absorbent materials to quickly lock in urine, keeping the baby's skin dry and preventing moisture and bacteria buildup. These diapers also provide a better fit, preventing leaks and friction, which helps minimize skin irritation.

2 Improved Hygiene for Infants and Toddlers

Diapers with multi-layer absorbent materials and leak-proof designs quickly absorb and lock in liquids, preventing urine and feces from staying on the skin. This barrier reduces the skin's exposure to moisture and irritants, minimizing the risk of skin irritation or infection. Prolonged contact with waste can cause redness, inflammation, or diaper rash. By using disposable baby diapers, infants' and toddlers' skin remains dry and clean, improving hygiene and ensuring skin health and comfort.

3 Convenience for Parents

Diapers reduce household cleaning workload, allowing parents to manage chores and childcare more efficiently. Disposable diapers are easy to use and dispose of, saving parents valuable time to focus on their children and other tasks. This convenience enhances household efficiency and helps parents achieve a better work-life balance, leading to a more fulfilling and satisfying life.

Industry Value of Baby Diapers and Baby Pants Products in Emerging Markets

For Enterprises



1 Get a Head Start of Brand

In emerging markets, the diaper brand competition is not yet saturated, offering opportunities for early market entry. Companies can establish a strong brand presence and build recognition, creating a competitive edge.

2 Gaining a Cost Advantage

Emerging markets offer a favorable cost structure for companies expanding manufacturing and distribution. The relatively low cost of labor and production is a significant advantage. By setting up local manufacturing facilities, companies can produce goods more affordably than in higher-cost regions, leading to a substantial reduction in production expenses.

3 Brand Innovation and Customization

Consumer demand in emerging markets is diverse, influenced by cultural, economic, and lifestyle factors. Diaper companies can tailor their products to meet these specific needs. For example, in hot and humid regions like parts of Africa, diapers should be designed with breathability and moisture-wicking properties to ensure comfort and prevent skin irritation.

4 High Potential for Demand Growth

Emerging markets have a younger demographic and a larger population of childbearing age, leading to higher demand for diapers and other mother and baby products. By entering these markets, companies can capitalize on the growth opportunities and benefit from market expansion.

Industry Value of Baby Diapers and Baby Pants Products in Emerging Markets

For Society



1 Reduction of the Spread of Infectious Diseases

Using diapers helps reduce the risk of spreading infectious diseases by effectively containing and isolating an infant's feces and urine. This is particularly important in daycare centers or other environments where infants and toddlers are together, as these settings have a higher risk of disease transmission.

2 Job Creation

The production and sale of diapers create numerous job opportunities, spanning from raw material procurement and production line operations to sales and distribution. These jobs provide economic support and contribute to community development and stability.

3 Economic Growth Promotion

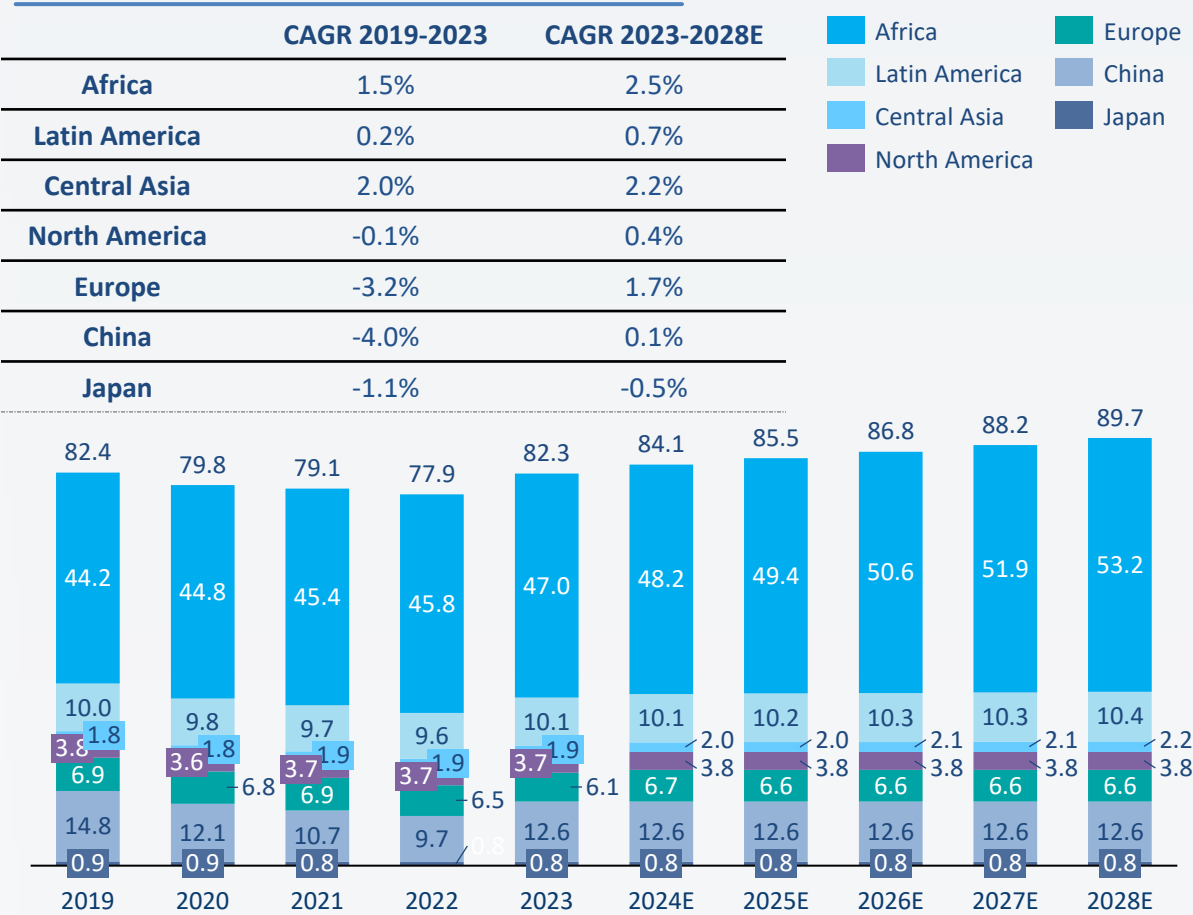
The diaper industry plays a significant role in local economic development. It creates numerous job opportunities, improving living standards and stimulating consumer market growth. Additionally, the industry drives the expansion of related sectors such as raw material supply, manufacturing, logistics, and packaging.

4 Improvement of Technology Level

To produce high-quality diapers, industry players implement advanced production technologies and equipment. Additionally, it encourages technological innovation and protects intellectual property rights, providing a strong foundation for the industry's long-term growth.

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Number of Birth Population in Emerging Markets and Other Markets
Africa, Latin America, Central Asia, North America, Europe, China, Japan
Million, 2019-2028E



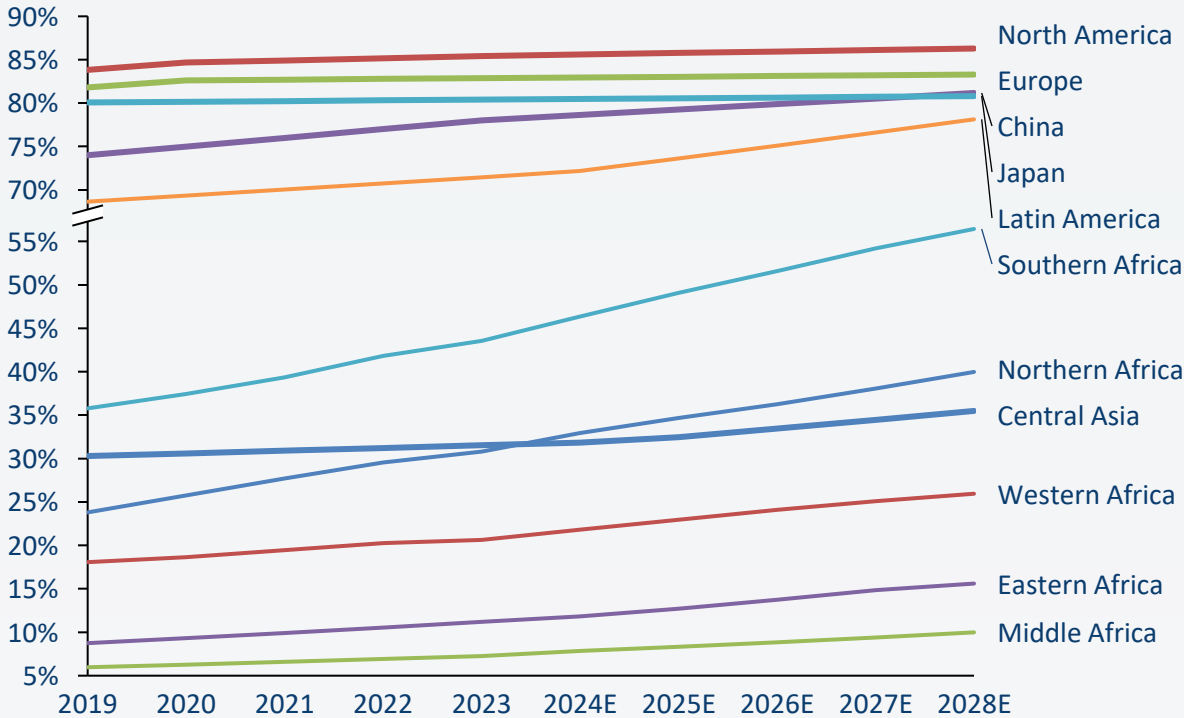
Key Findings

- Overall, the emerging markets have a large number of births and maintain a stable and high growth trend. With Africa as a representative, over the past five years, the annual birth of the population remained at about 45 million and held the overall upward trend, the number of newborns is huge, and the demographic bonus is extremely obvious, bringing broad growth opportunities for the diaper market.
- However, in non-emerging market regions, like North America, Europe, China, and Japan, the number of births in the past five years has maintained a low-speed downward trend, and is expected to improve in the next five years, under the background of the countries' policies of encouraging births.

Source: Frost & Sullivan

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Baby Diaper and Baby Pants Penetration Rate, by Different Regions
%, 2019-2028E



Key Findings

- The penetration rate of baby diapers and baby pants is closely linked to the level of local economic development and social and cultural practices. In economically developed regions such as North America, Europe, and Japan, where residents have higher per capita incomes, the use of baby diapers or baby pants has become a routine choice for family daily care, resulting in a more widespread user base for diapers in these areas. In contrast, due to relatively lagging economic development and lower per capita incomes in Africa and Central Asia, the market penetration rate of baby diapers and baby pants is lower. In these regions, traditional diapers or other alternatives are often the preferred choice for families, partly due to a lack of awareness of modern diapers and economic considerations of their cost.
- However, with the rapid economic development in Africa and Central Asia, the living standards and consumption power of residents are gradually improving. It is expected that in the future, as market education in these regions intensifies and consumer awareness increases, more and more families will tend to choose cleaner, more hygienic, and convenient diapers to replace traditional ones. This shift will drive a significant increase in the penetration rate of related products. Additionally, with the improvement of retail networks and sales channels, the popularity of baby diapers or baby pants in these emerging markets is expected to greatly increase.

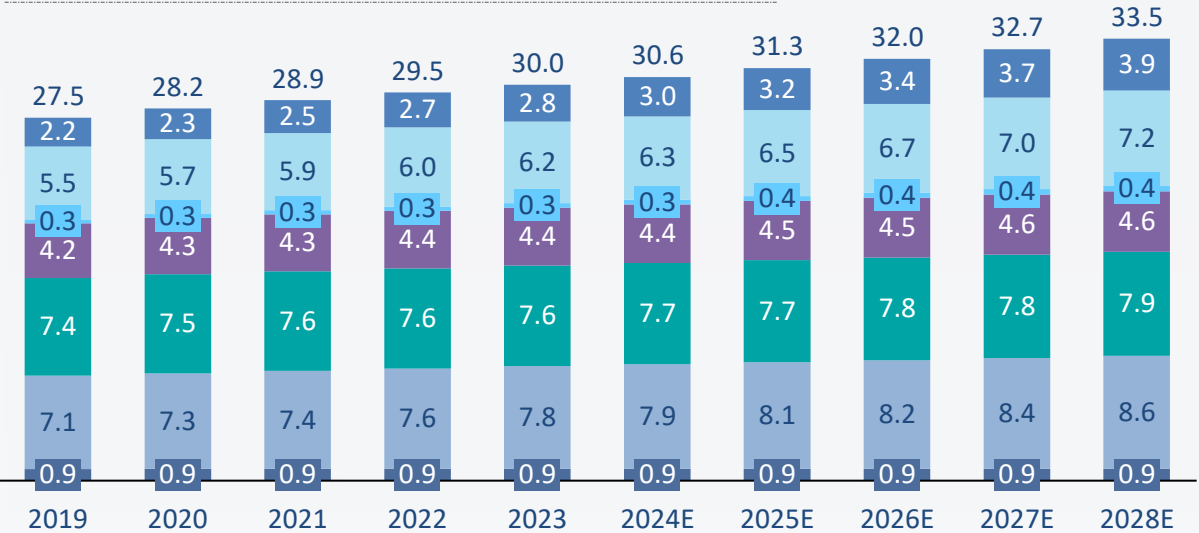
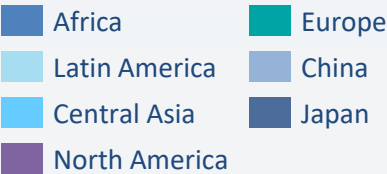
Source: Frost & Sullivan

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Baby Diapers and Baby Pants, by Different Regions

USD Billion, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Africa	6.2%	7.2%
Latin America	2.9%	3.1%
Central Asia	4.6%	5.0%
North America	1.3%	0.9%
Europe	0.8%	0.7%
China	2.4%	1.9%
Japan	0.3%	0.1%



Key Findings

- All regions listed in the table are experiencing growth in the baby diaper market, within that, Africa, Central Asia, and Latin America contributed the most of this growth. The enhance disposable income led by economic advancements, as well as wider product availability, are key for this growth.
- Africa and Central Asia have the highest CAGR within all regions, being 6.2% and 4.6% respectively. The rapid growth of the baby diaper market in Africa and Central Asia can be attributed to several key factors: a young and growing population with high birth rates, economic growth boosting consumer spending power, urbanization changing consumption habits, technological innovation driving product diversification, and policy support fostering a favorable market environment. Together, these factors have fueled a surge in demand, creating vast opportunities for the diaper market.

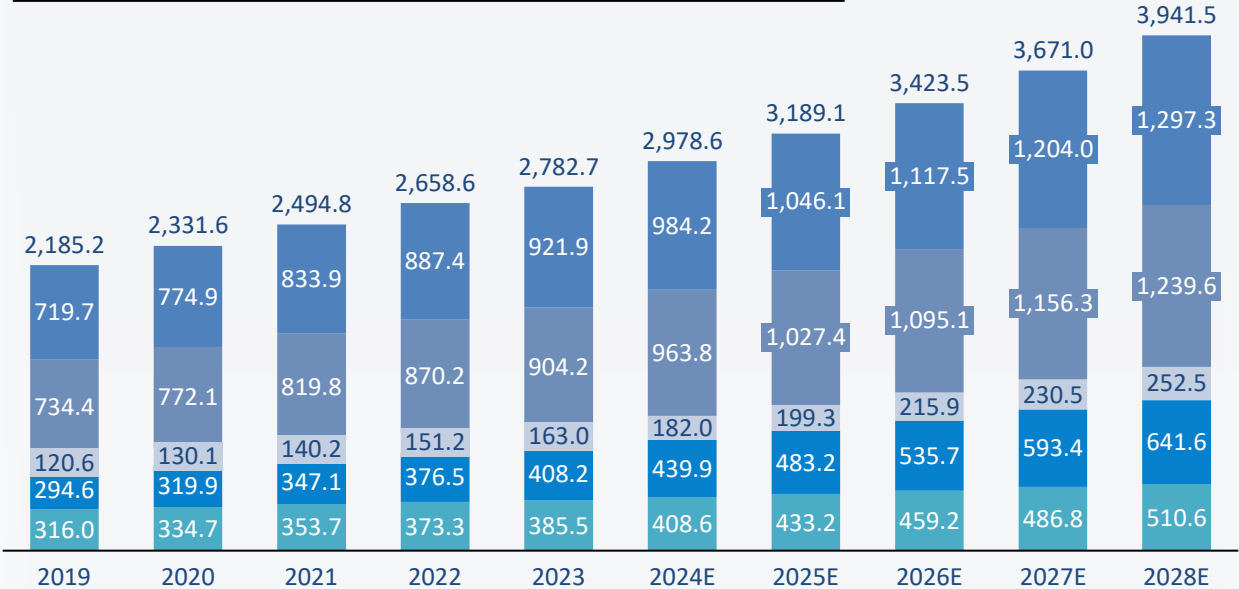
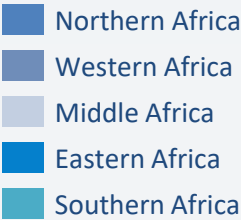
Source: Frost & Sullivan

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Baby Diapers and Baby Pants, by Different Regions

USD Million, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Northern Africa	6.4%	7.1%
Western Africa	5.3%	6.5%
Middle Africa	7.8%	9.2%
Eastern Africa	8.5%	9.5%
Southern Africa	5.1%	5.8%



Key Findings

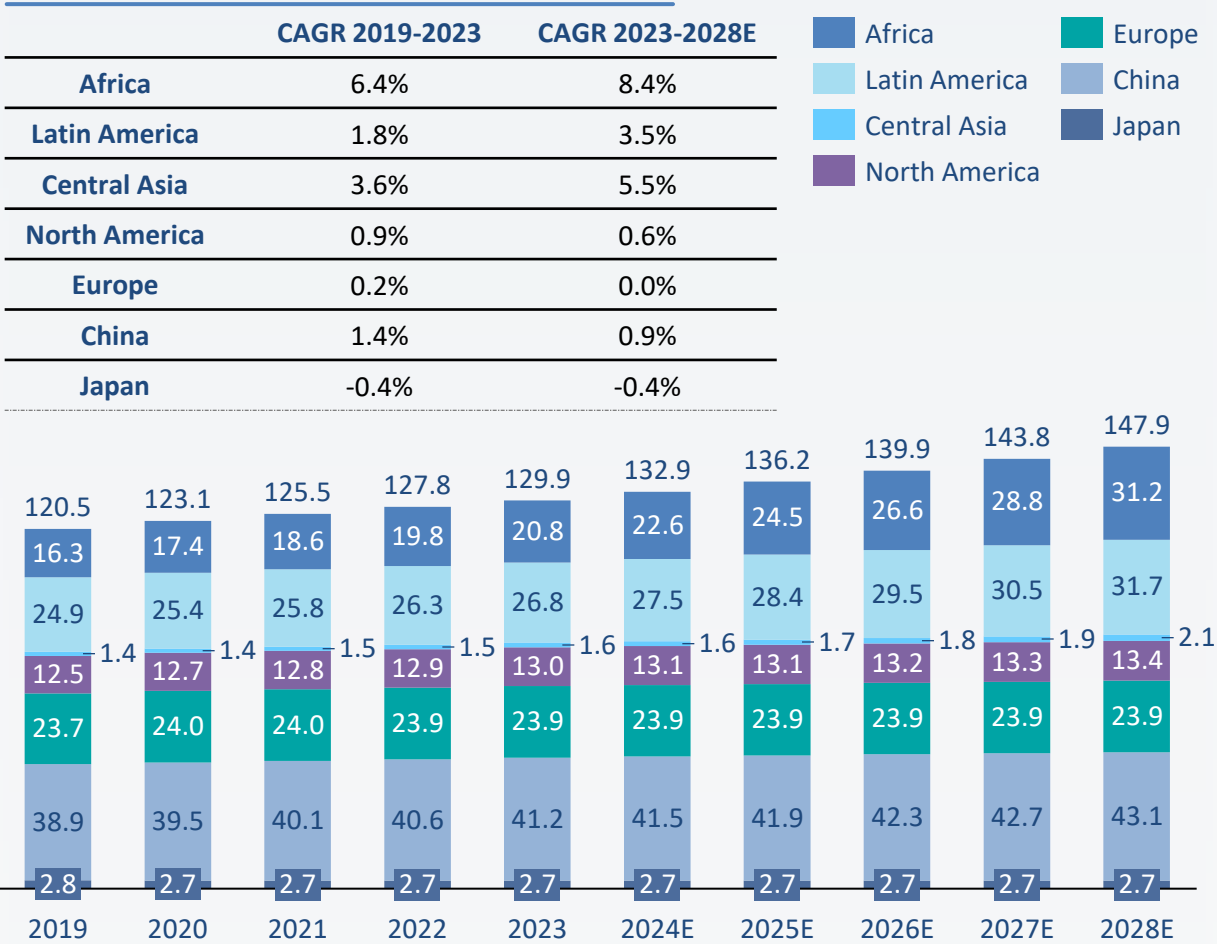
- The market size of baby diapers and baby pants in Africa has shown significant growth in recent years, with rapid population growth being the main driver of this trend. Southern Africa and Northern Africa boast a relatively stronger economic foundation, with higher income levels among residents, leading to greater spending power and a stronger demand for high-quality infant care products. Furthermore, the faster pace of urbanization in these regions, coupled with more developed modern retail channels, facilitates the marketing and sale of fast-moving consumer goods like diapers.
- All regional markets in Africa have shown steady annual growth rates, with Eastern Africa experiencing the highest growth, at 8.5% and 9.5% respectively. The future growth potential of the baby diaper market in Western Africa, Middle Africa, and Eastern Africa is considerable, primarily due to rapid population growth, particularly among the youth, signaling a sustained increase in demand for infant care products. Additionally, economic development and rising incomes are enhancing consumer spending power, offering ample room for market expansion.

Source: Frost & Sullivan

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Baby Diapers and Baby Pants, by Different Regions

Billion Pieces, 2019-2028E



Key Findings

- All major regions listed in the table are experiencing growth in the baby diapers market except Japan due to the decreasing birth rate, within that, Africa, Central Asia, and Latin America contributed the most of this global growth. The enhanced disposable income led by economic advancements, and wider product availability, are key for the market growth.
- Africa and Central Asia have the highest CAGR among all regions, 6.4% and 3.6% respectively. The rapid growth of the baby diaper market in Africa and Central Asia can be attributed to several key factors: population growth and a higher proportion of young people, leading to an increase in the number of newborns, which directly drives the demand for the diapers products; acceleration of urbanization process leading to modernized lifestyles; economic growth and disposable income growth; increasing products selections and availability for the consumers.

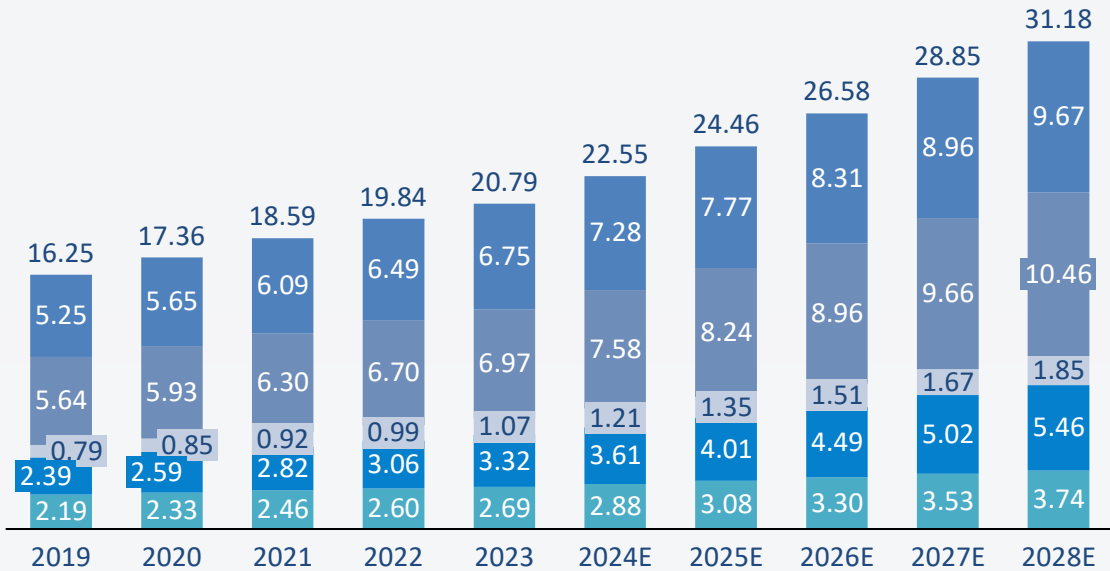
Source: Frost & Sullivan

Baby Diapers and Baby Pants Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Baby Diapers and Baby Pants, by Different Regions

Billion Pieces, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Northern Africa	6.5%	7.5%
Western Africa	5.4%	8.5%
Middle Africa	7.9%	11.5%
Eastern Africa	8.6%	10.5%
Southern Africa	5.2%	6.8%



Key Findings

- In terms of volume, the baby diapers market in all regions of Africa has shown a rapid growth trend, with Eastern Africa experiencing the fastest growth rate at 8.6% from 2019 to 2023, and Middle Africa is estimated to have the fastest growth rate at 11.5% from 2023 to 2028. Notably, Western Africa has consistently held the largest market share, increasing from 5.6 billion pieces in 2019 to 7.0 billion pieces in 2023, and estimated to be 10.5 million pieces in 2028.
- There are a couple of main factors driving the fast growth in African baby diapers market. First of all, Africa's population continues to grow and has relatively high fertility rate, indicating the high demand for baby diapers. Furthermore, the infant mortality rate is declining steadily due to the development of healthcare industry. Secondly, the urbanization process and the modernization of lifestyles have made residents more inclined to use modern baby care products, such as baby diapers. Last but not least, there are more policy supports, social and health awareness that are contributing to more consumption of baby care products. Also with more products selection and availability to the consumers have made the markets to increase at a steady pace.

Source: Frost & Sullivan

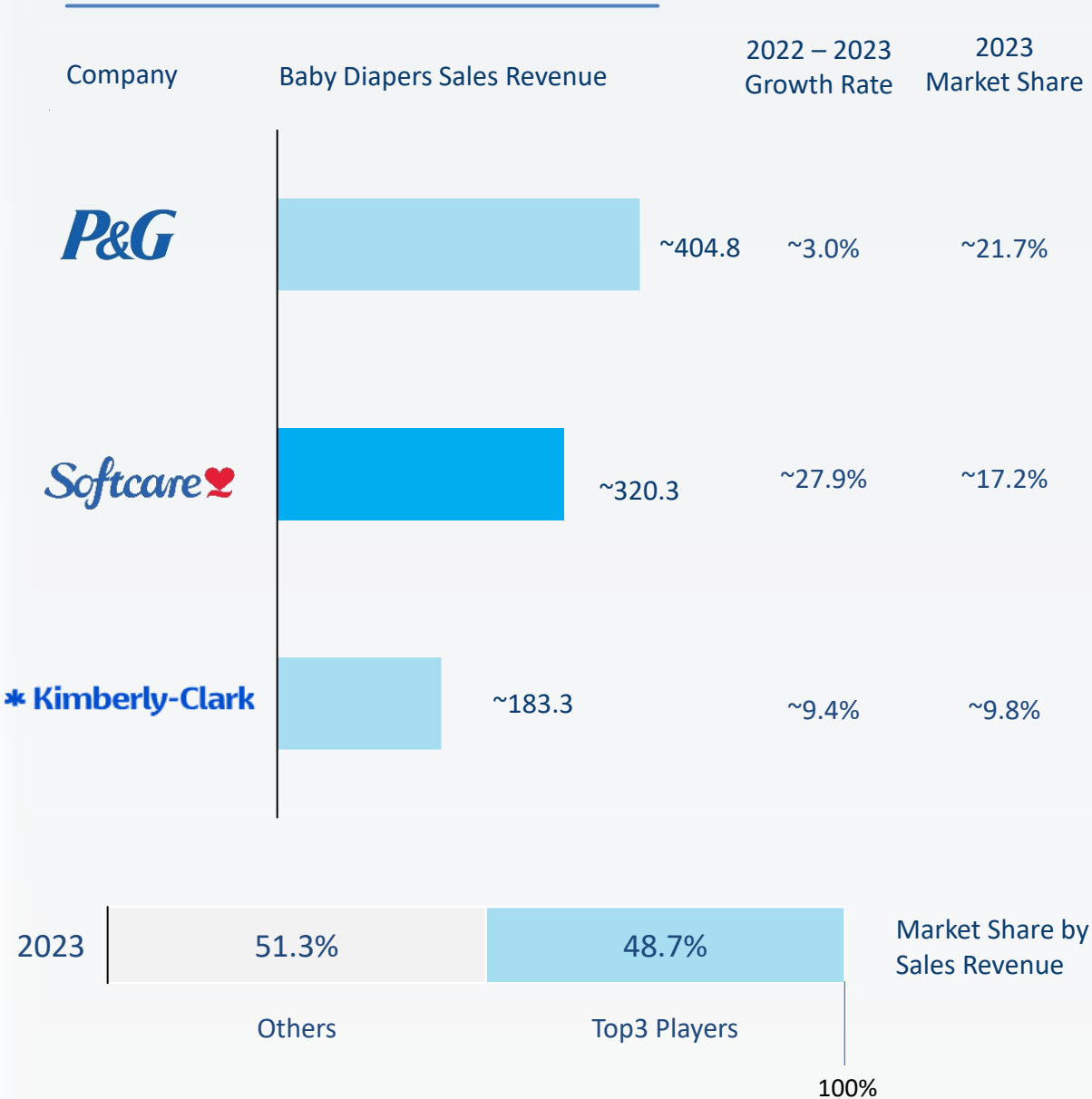
Competitive Landscape of Baby Diapers Products Industry in Emerging Markets

In emerging markets like Africa, the competitive landscape for baby diapers products is highly concentrated, with brands that have established local distribution channels, developed region-specific products, and built local manufacturing facilities often gaining a competitive edge.



Competitive Landscape of Baby Diapers Products Industry in Emerging Markets

Baby Diapers Sales Revenue in Africa/Million USD, 2023

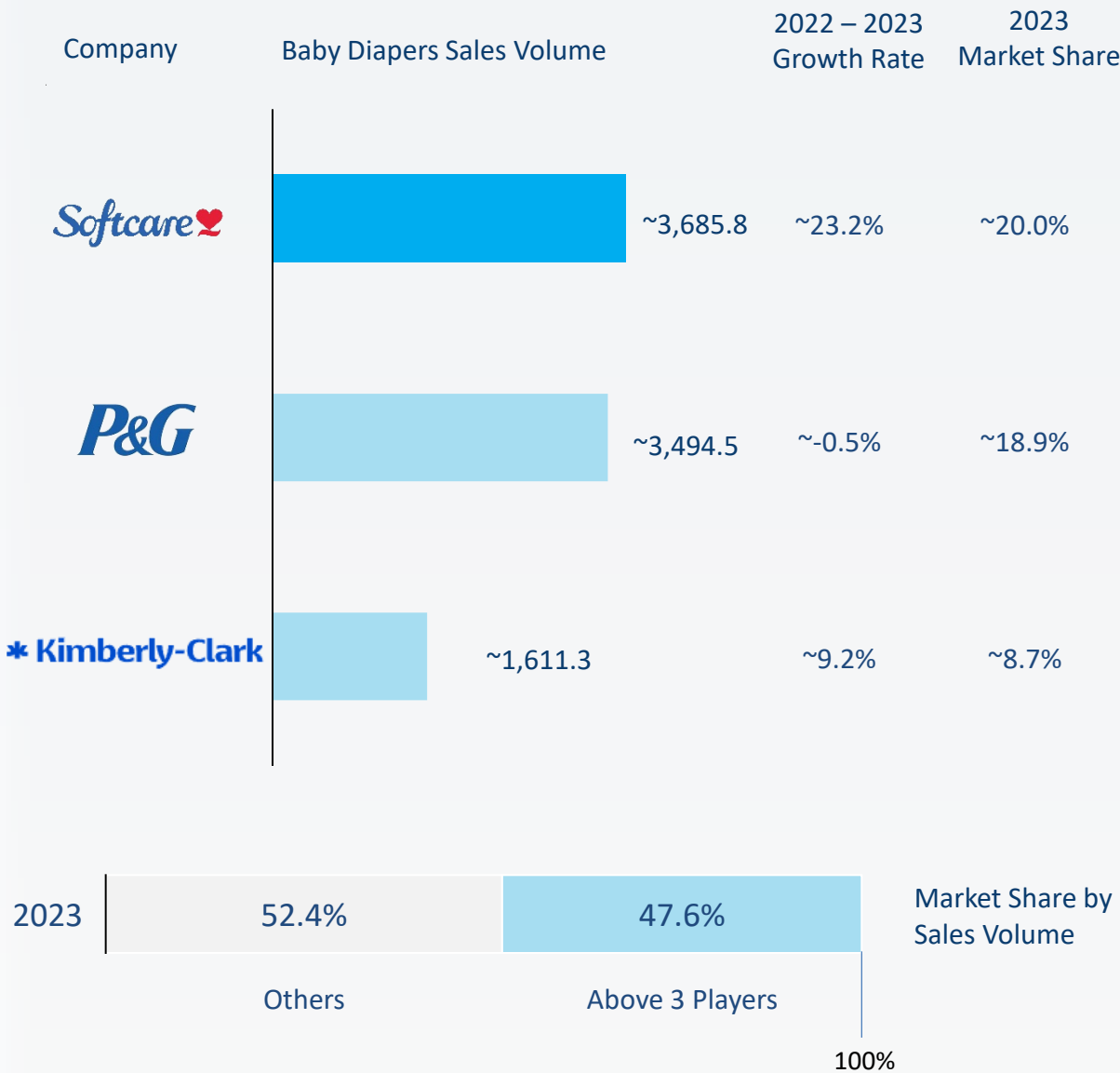


The Softcare brand has a significant presence in the African baby diapers market, with a market share of 21.7% by sales revenue of 2023, and is the No. 1 player in the baby diapers market in Ghana, Côte d'Ivoire, Senegal, Cameroon, Kenya, Tanzania.

Source: Frost & Sullivan

Competitive Landscape of Baby Diapers Products Industry in Emerging Markets

Baby Diapers Sales Volume in Africa/Million Pieces, 2023



The Softcare brand has a significant presence in the African baby diapers market, with a market share of 20.0% by sales volume of 2023, and is the No. 1 player in the baby diapers market in Ghana, Côte d'Ivoire, Senegal, Cameroon, Kenya, Tanzania.

Source: Frost & Sullivan

Competitive Landscape of Baby Diapers Products Industry in Emerging Markets

Baby Diapers Production Output in Africa/Million Pieces, 2023

Company	Baby Diapers Production Output	2022 – 2023 Growth Rate
Softcare	~4,659.1	~15.9%
P&G	~3,545.0	~-0.5%
* Kimberly-Clark	~1,622.0	~8.5%



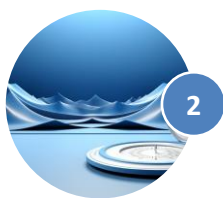
Source: Frost & Sullivan

Future Trends of Baby Diapers and Baby Pants Products Industry in Emerging Markets



Increasing Consumer Brand Awareness

As income levels rise, consumers increasingly pursue well-established brands. These well-known brands, which offer higher-quality, safer, and more environmentally friendly products, gain greater respect and are chosen by a growing number of discerning consumers. This shift in consumer preference reflects a heightened demand for products that not only meet functional needs but also align with values such as safety, quality, and sustainability. As a result, reputable brands that prioritize these aspects are more likely to capture and retain consumer loyalty in the competitive market.



Heightening Consumer Demand for Product Quality

With the improvement of living standards, consumers pay increasing attention to the quality of baby diaper products. Their demands on various aspects of the product such as healthiness, safety and performance are gradually increasing. Parents are increasingly concerned about whether diapers are made from skin-friendly materials, have superior absorbency, and are leak-proof. In addition, consumers are concerned about breathability, comfort and environmental friendliness. These elevated requirements are driving manufacturers to continuously improve their products and adopt more advanced technologies and materials to meet consumer expectations and ensure the health and comfort of infants and children.

Future Trends of Baby Diapers and Baby Pants Products Industry in Emerging Markets



Enhancing Levels of Product Innovation and Differentiation

To attract consumers, brands will continuously introduce innovative products, such as more breathable, comfortable, and eco-friendly diapers, as well as products with additional features like antibacterial and hypoallergenic properties. As market competition intensifies, diaper companies will differentiate their products through innovative designs, customized services, and pricing strategies to meet the needs of various consumer groups.



Increasing Importance of Supply Chain Stability

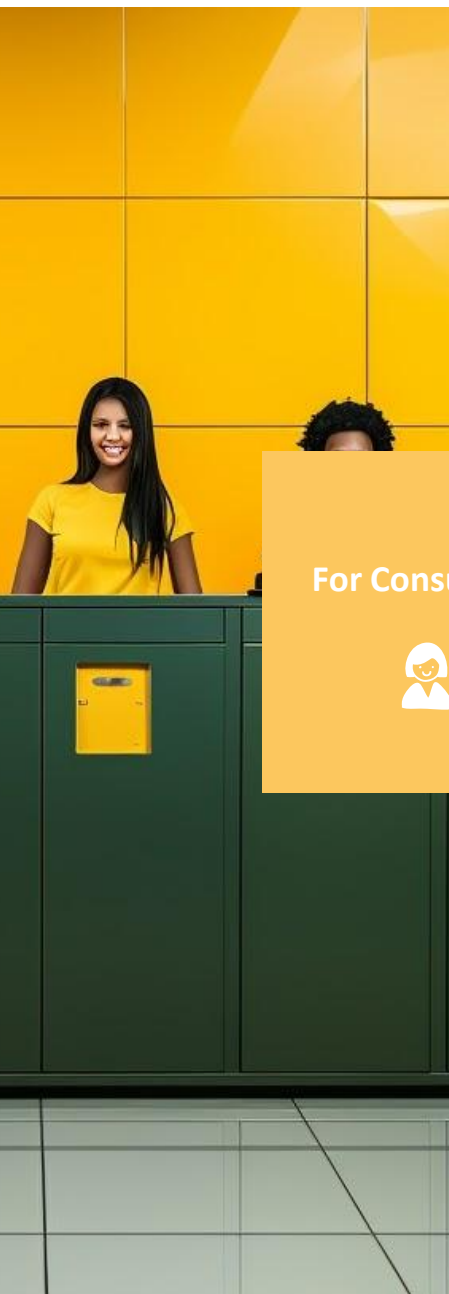
The importance of supply chain stability is increasing to ensure production compliance and quality consistency for baby diaper products. A robust and reliable supply chain is essential for maintaining a steady supply of products and upholding high-quality standards, which is critical for meeting consumer expectations. Consequently, companies are investing more in supply chain management, optimizing logistics, and building strong partnerships with suppliers. These efforts enhance their resilience and efficiency in the marketplace, ensuring they can consistently deliver products that meet the stringent demands of discerning consumers.



Chapter 3

Status Quo and Competitive Landscape of the
Feminine Hygiene Products Industry in Emerging Markets

Industry Value of Feminine Hygiene Products in Emerging Markets



1 Improve Women's Mental Health

Reliable sanitary pads improve women's mental health by reducing anxiety and embarrassment, boosting self-esteem, and promoting confidence. This allows women to focus on daily activities, fostering normalcy, dignity, and control over their bodies.

2 Enhance Women's Physical Health

In many emerging markets, women use alternatives to sanitary pads, such as rags, cloths, cotton, toilet paper, or even natural materials like grass and leaves. These options are less effective and hygienic, leading to skin irritation and health issues. The development of sanitary pads has provided better solutions for menstrual hygiene, reducing the risk of infections and improving overall health. During the rainy season, the humid climate increases the risk of bacterial growth, making sanitary pads more essential for maintaining dryness and preventing infections.

3 Improve Women's Life Quality

The popularization of sanitary pads in emerging markets can significantly improve women's quality of life by enabling them to comfortably participate in their daily activities without the constraints of menstrual distress. The convenience brought by sanitary pads positively impacts both women's physical and mental health.

Industry Value of Feminine Hygiene Products in Emerging Markets



1 Market Expansion and Revenue Growth

Emerging markets are characterized by having a large population base and high demand potential, offering significant opportunities for companies to expand their customer base and increase sales. Establishing a strong presence in emerging markets can diversify revenue streams and reduce reliance on saturated markets.

2 Brand Reputation and Social Responsibility

Promoting sanitary pads in emerging markets can significantly improve local women's quality of life and enhance the brand's social responsibility image. Providing affordable and reliable sanitary pads helps prevent infections, demonstrating the company's commitment to social impact and empowerment of women.

3 Innovation and Product Development

Companies need to develop products within the local context to meet local markets' demands. This innovation process not only enhances the brand's technological capabilities but also allows for the application of these innovations in other markets, driving the development and upgrading of the overall product line.

4 Long-Term Potential of the Markets

As the economies of emerging markets develop and the living standards of their residents improve, emerging markets' spending power and demand for high-quality sanitary pads will grow continuously. Entering the markets early and building brand recognition can lay the foundation for the brand's long-term development in these markets.

Industry Value of Feminine Hygiene Products in Emerging Markets



1 Improvement of Female Education and Employment Status

Reliable sanitary pads enable women to consistently participate in school and work, reducing menstrual-related absences. Over time, this boosts women's education and economic status in emerging markets, contributing to higher academic achievements and economic growth.

2 Break Social Taboos and Increase Social Status of Women

The widespread use of sanitary pads has made menstruation less taboo, improving women's status in families and society. It boosts self-confidence, encourages social participation, and empowers women to take control of their reproductive health, fostering broader societal progress.

3 Foster Gender Equality

The widespread use and accessibility of sanitary pads are important to gender equality. The provision of essential menstrual products can reduce gender discrimination and social inequalities resulting from poor menstrual management. Access to these products ensures that women can participate fully in society without fearing embarrassment or health risks. It also helps to challenge the cultural stigmas regarding menstruation, leading to a more open and supportive environment for all.

Industry Value of Feminine Hygiene Products in Emerging Markets



4 Boost Economic Growth and Innovation

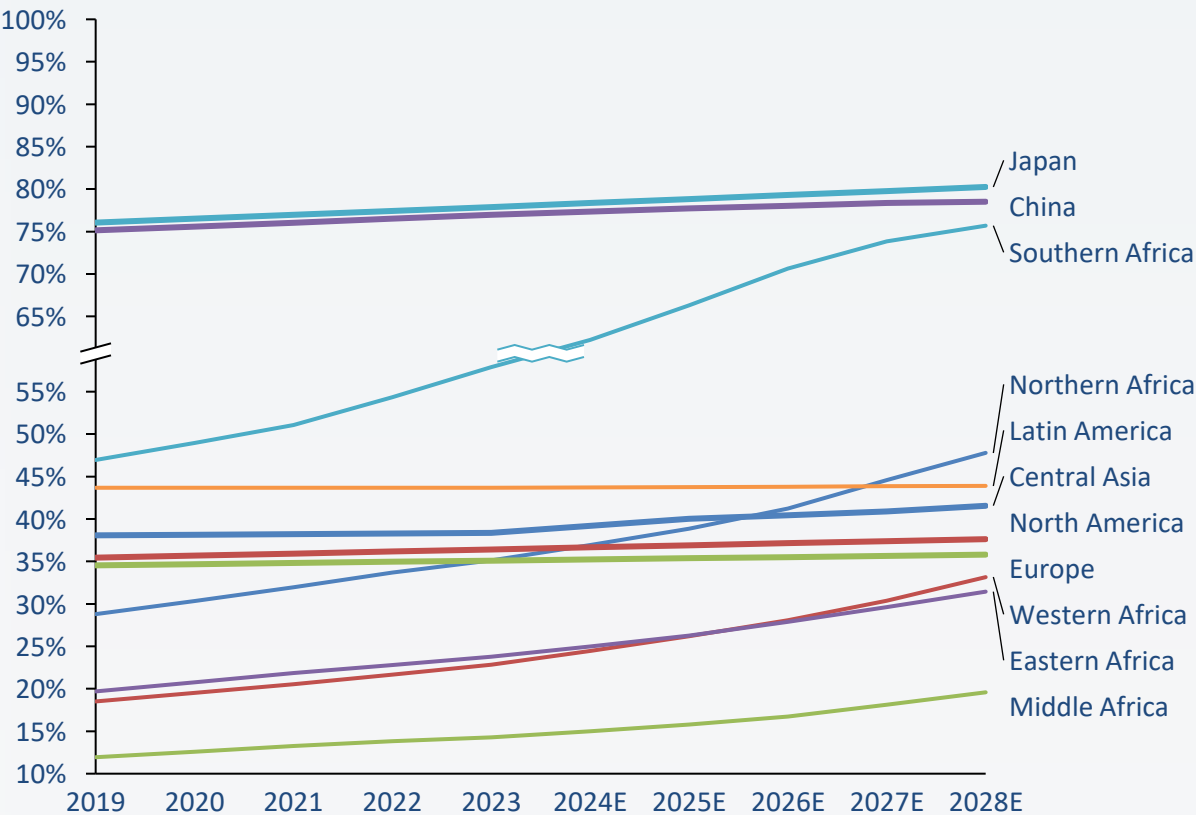
The development of the sanitary pads industry has led to the growth of related manufacturing, sales, and retailing chains, creating employment opportunities and contributing to the economic growth of emerging markets. This expansion not only provides jobs but also promotes skills development and workforce diversification. At the same time, it has stimulated innovation of local and foreign companies, enhancing product quality and accessibility and encouraging the development of products better suited to local needs and preferences.

5 Promote Environmental Preservation

As the industry grows, more sustainable and eco-friendly sanitary pads are introduced. This helps reduce the use of plastics and harmful chemicals, significantly lowering environmental pollution. The shift towards eco-friendly products not only benefits the environment but also promotes healthier choices for consumers. By offering sustainable alternatives, companies contribute to a circular economy and responsible consumption. Promoting these products also raises consumers' environmental awareness, encouraging them to make more informed and environmentally conscious decisions.

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Sanitary Pads Penetration Rate, by Different Regions
%, 2019-2028E



Key Findings

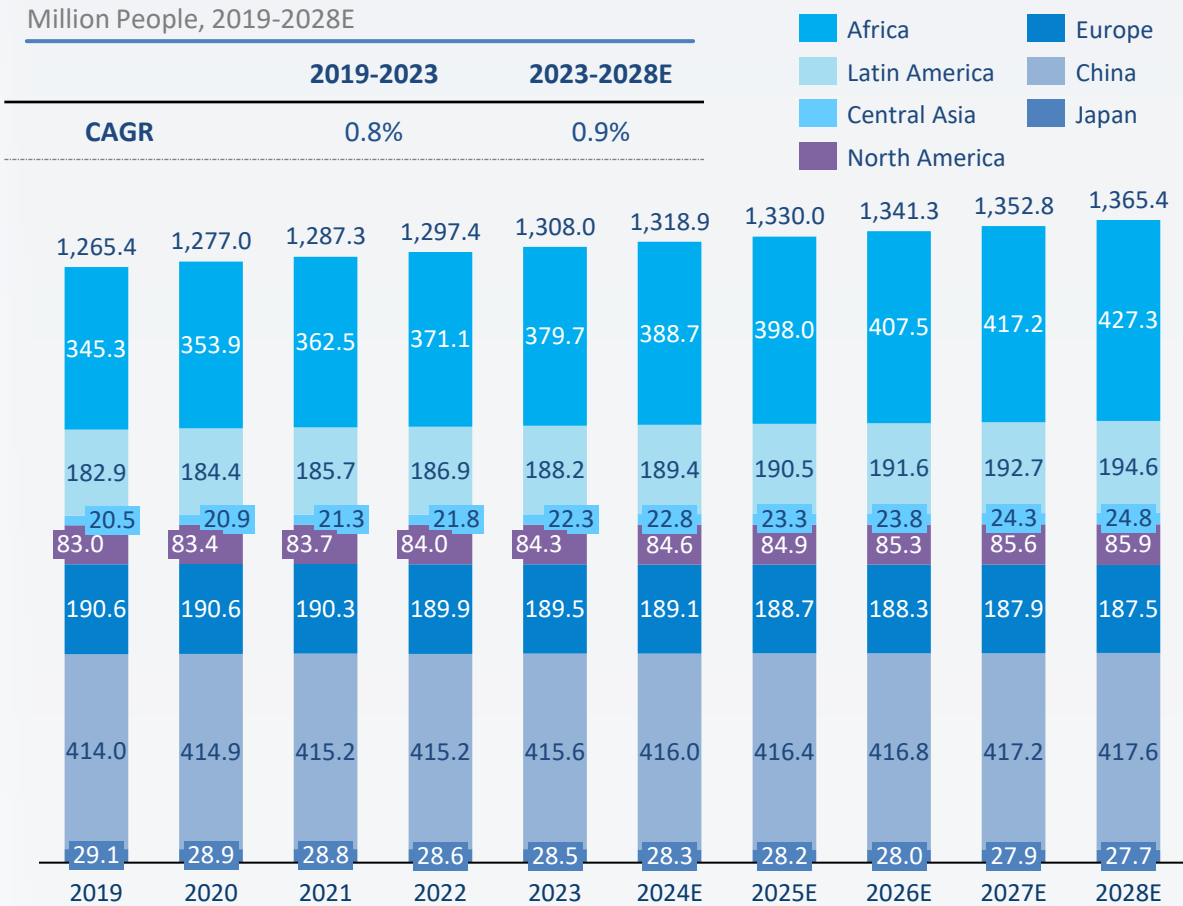
- The key influencing factors for female sanitary pad penetration rates include economic development level, education access, sociocultural attitudes, hygiene and health awareness, market sales networks, product diversity and innovation, government policies, media promotion, and infrastructure conditions.
- In Africa, despite the currently low penetration rate of female sanitary pads, a combination of rapid economic growth, improved education standards, heightened health consciousness, and government focus on women's health issues is driving an increase in demand for sanitary pad products. Africa boasts a vast young female population, and with an unsaturated market, this presents significant growth opportunities for sanitary pad brands.
- In Northern Africa and Europe, while the penetration rate of female hygiene products is relatively high, cultural influences have led to a preference for tampons over sanitary pads among many women, resulting in a not-so-high penetration rate for sanitary pads.

Source: Frost & Sullivan

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Number of Women of Childbearing Age in Major Markets* (Africa, Latin America, Central Asia, North America, Europe, China, Japan)

Million People, 2019-2028E



Key Findings

- Due to higher birth rates and a younger population structure, the proportion of women of childbearing age is higher in Africa and Central Asia. In contrast, Europe and Japan face the challenge of an aging population, with a relatively lower proportion of women of childbearing age and a declining trend. In Latin America, the proportion of women of childbearing age is moderate, but the growth rate is slowing due to a decrease in birth rates. In North America, the proportion of women of childbearing age is relatively stable, and there is potential for population growth due to immigration policies. In China, the proportion of women of childbearing age has declined due to the impact of the one-child policy, but it is expected to stabilize with policy adjustments.
- Overall, the sales of the global population of women of childbearing age is uneven, with varying situations in different regions, influenced by factors such as birth rates, population structure, and policies.

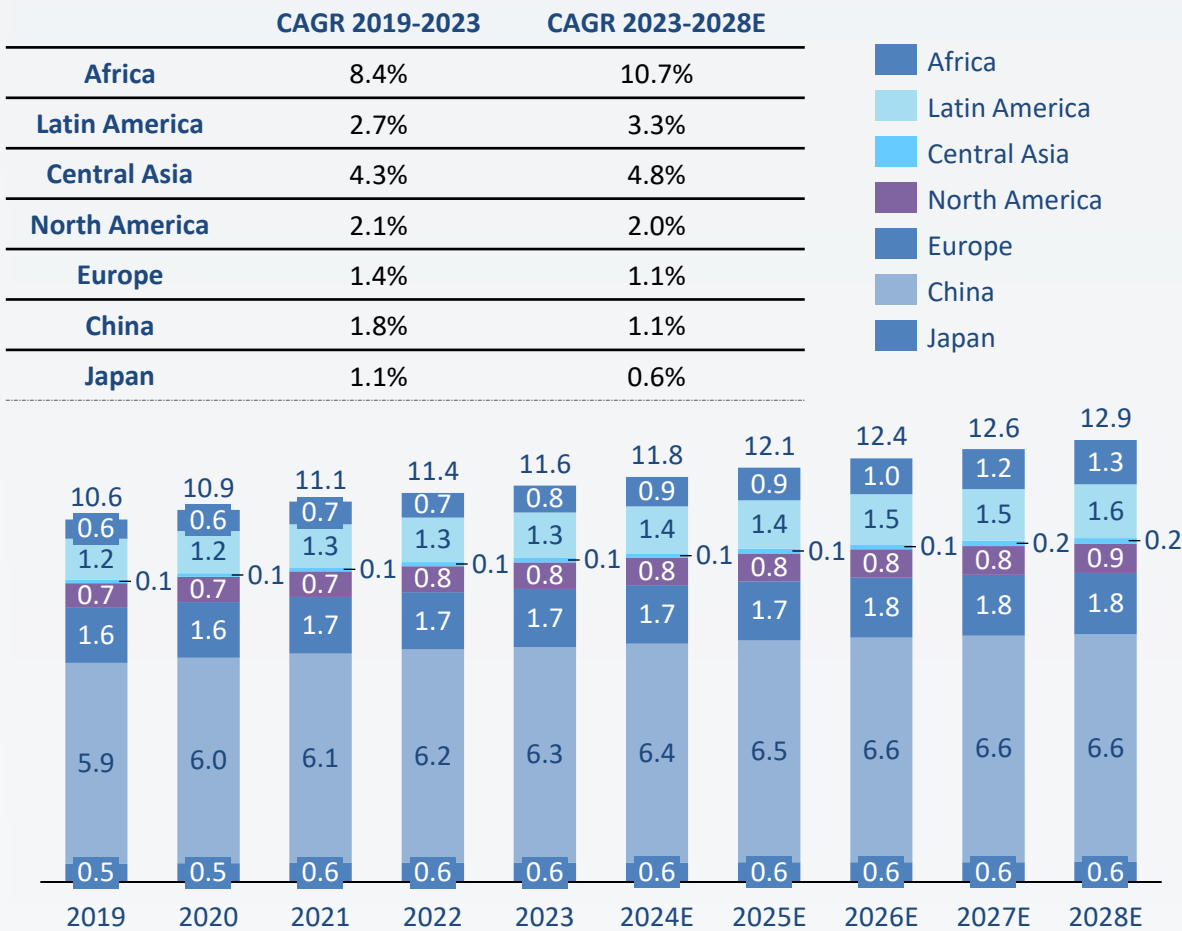
Note: Women of childbearing age are women who are capable of reproducing, i.e., in the menstrual phase, and according to UNICEF data, are between 12 and 50 years of age.

Source: Frost & Sullivan

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Sanitary Pads, by Different Regions

USD Billion, 2019-2028E



Key Findings

- Overall, the sanitary pads market size is showing an expanding trend within the analyzed regions, growing from USD10.6 billion in 2019 to an estimated USD12.9 billion by 2028. China accounts for the largest share of the investigated markets and has been showing steady growth in recent years. This is due to China's large female population, and cultural factors and hygiene education have made the use of sanitary pads more common.
- Africa's market size is growing, at a CAGR of 8.4% before 2023 and is expected to grow at a CAGR of 10.7% to 2028. The rapid growth of the female sanitary pad market in Africa can be attributed to various factors, encompassing multiple dimensions such as economic, social, cultural, and market aspects.

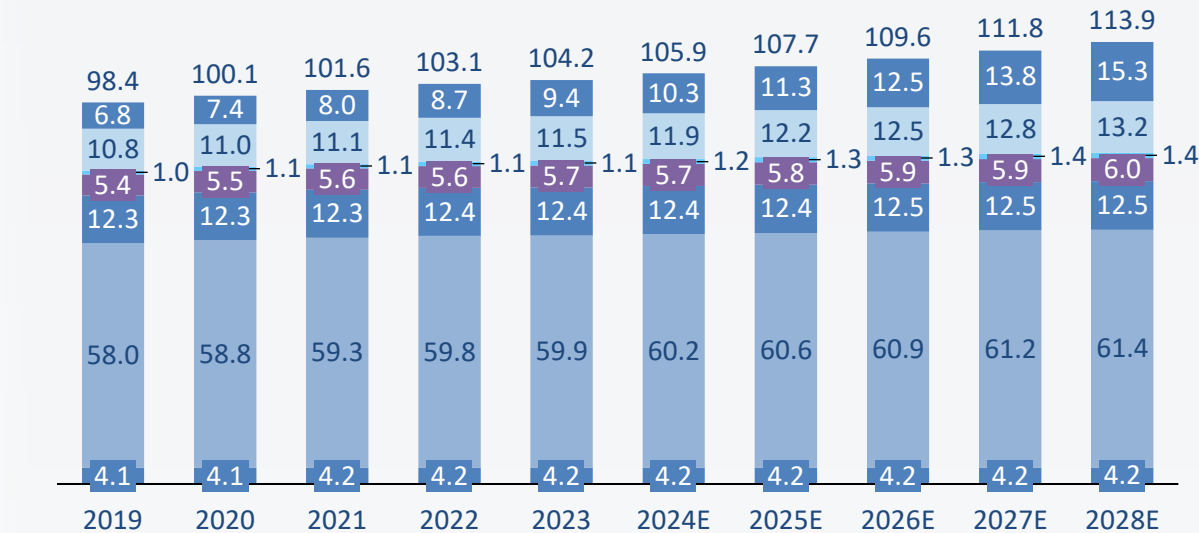
Source: Frost & Sullivan

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Sanitary Pads, by Different Regions

Billion Pieces, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Africa	8.5%	10.3%
Latin America	1.7%	2.8%
Central Asia	2.3%	4.3%
North America	1.1%	1.0%
Europe	0.3%	0.1%
China	0.8%	0.5%
Japan	0.1%	0.1%



Key Findings

- In terms of volume, the market size of sanitary pads shows an increase among major areas. China dominates the sanitary pads market size among these major regions due to its large population base and its cultural practices that lead women to prefer sanitary pads over tampons in their choice of hygiene products.
- Within all the major areas, Africa shows the highest growth rate with a CAGR of 8.5% from 2019 to 2023 and a CAGR of 10.3% from 2023 to 2028 estimated. This is driven by the factors of large population base of Africa, high population growth rate, and increasing sanitary pads penetration rate in Africa market. Furthermore, Central Asia and Latin America also have relatively high growth rate due to the multiple dimensions factors such as economic, social, cultural and market aspects.

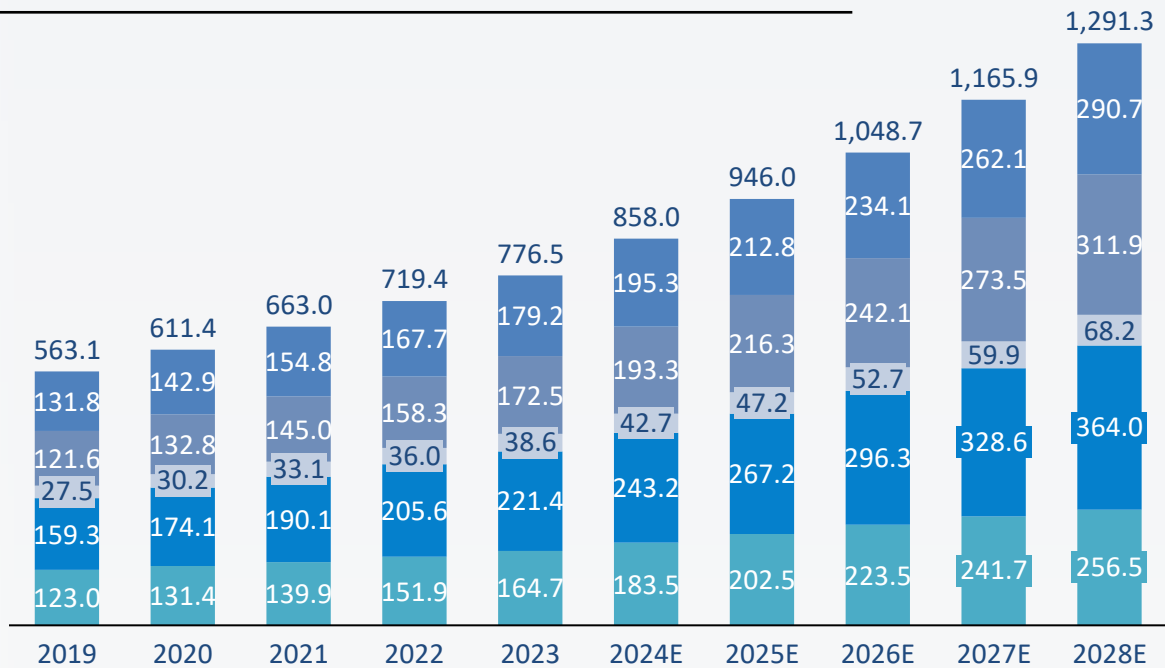
Source: Frost & Sullivan

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Sanitary Pads in Africa, by Different Regions

USD Million, 2019-2028E

	CAGR 2019-2023	CAGR 2023-2028E
Northern Africa	8.0%	10.2%
Western Africa	9.1%	12.6%
Middle Africa	8.8%	12.1%
Eastern Africa	8.6%	10.5%
Southern Africa	7.6%	9.3%
Africa	8.4%	10.7%



Key Findings

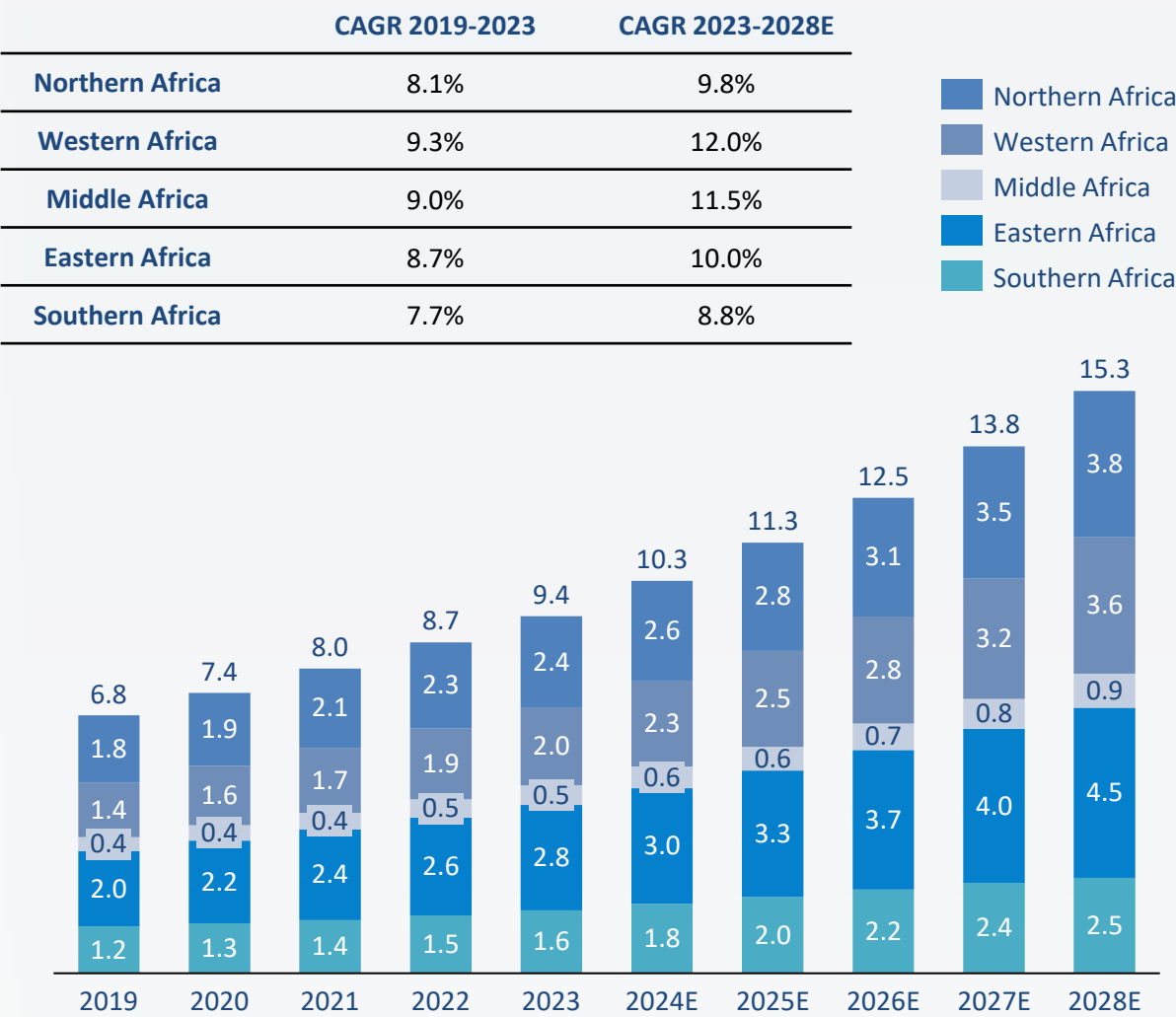
- The sanitary pads market across Africa is growing rapidly, with Western Africa leading at growth rates of 9.1% and 12.6%. Eastern Africa holds the largest market share, increasing from USD 159.3 million in 2019 to USD 221.4 million in 2023. The market's growth is driven by several factors: the large, youthful population and high proportion of women of reproductive age; rising economic status and hygiene awareness among women; cultural shifts due to globalization and education; and increased consumer expectations for quality and comfort as incomes and living standards rise.

Source: Frost & Sullivan

Feminine Hygiene Products Industry Market Volume and Growth Rate in Emerging Markets

Market Size of Sanitary Pads in Africa, by Different Regions

Billion Pieces, 2019-2028E



Key Findings

- The sanitary pads market in Africa is experiencing rapid growth, with Western Africa seeing the highest growth rates at 9.3% and 12.0%. Eastern Africa leads in market share, growing from 2.0 billion pieces in 2019 to 2.8 billion in 2023, with projections of 4.5 billion by 2028. Key drivers include a large, fast-growing population, rising disposable income due to economic growth and urbanization, increased health education and awareness, and greater brand attention leading to higher market penetration and consumption.

Source: Frost & Sullivan

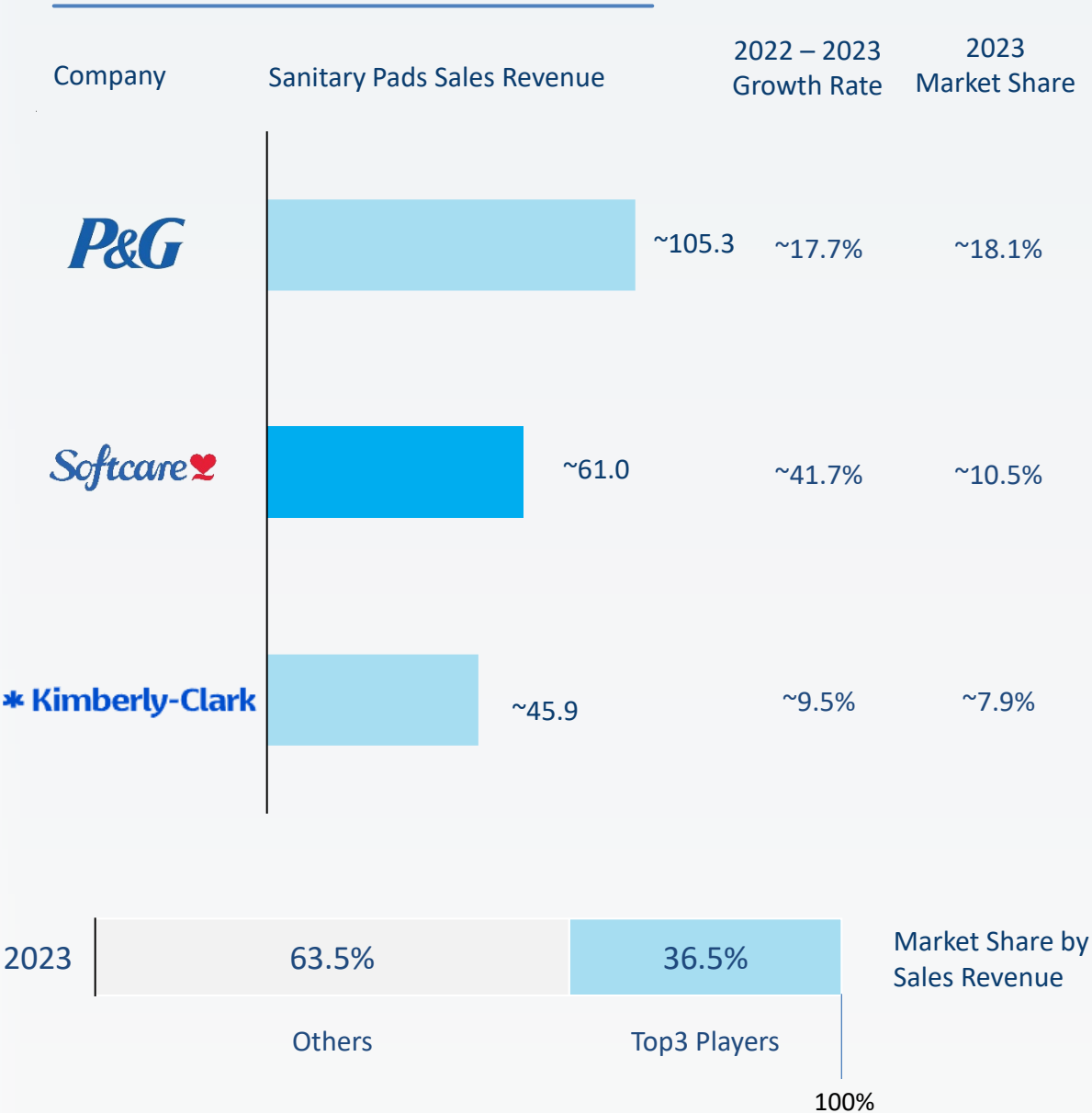
A woman with voluminous dark curly hair, wearing a mustard yellow corded blazer over a brown top, is seated and smiling towards the camera. She is positioned in front of a large window that offers a panoramic view of a city skyline under a clear blue sky. The window frame is dark, and the city buildings are visible in the background. The overall lighting is bright and natural, suggesting daytime.

Competitive Landscape of Feminine Hygiene Products Industry in Emerging Markets

In emerging markets like Africa, the competitive landscape for feminine hygiene products is highly concentrated, with brands that have established local distribution channels, developed region-specific products, and built local manufacturing facilities often gaining a competitive edge.

Competitive Landscape of Feminine Hygiene Products Industry in Emerging Markets

Sanitary Pads Sales Revenue in Africa/Million USD, 2023



The Softcare brand has a significant presence in the African sanitary pads market, with a market share of 14.0% by sales revenue of 2023, and is the No. 1 player in the sanitary pads market in Senegal, Kenya and Tanzania.

Source: Frost & Sullivan

Competitive Landscape of Feminine Hygiene Products Industry in Emerging Markets

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Source: Frost & Sullivan

Competitive Landscape of Feminine Hygiene Products Industry in Emerging Markets

Sanitary Pads Production Output in Africa/Million Pieces, 2023

Company	Sanitary Pads Production Output	2022 – 2023 Growth Rate
Softcare	~2,414.1	~45.0%
P&G	~1,053.5	~2.0%
* Kimberly-Clark	~630.3	~8.2%



Source: Frost & Sullivan

Future Trends of Feminine Hygiene Products Industry in Emerging Markets



Product Diversification, Personalization and Competition

With the diversification of consumer needs, sanitary pads brands continue introducing various products, including ultra-thin, anti-leakage, organic cotton materials and biodegradable products. Brands will focus more on personalization and customization to meet the needs of consumers of different age groups, lifestyles and preferences. Meanwhile, female consumers will gradually become more brand-adhesive to sanitary pads, and they may tend to choose familiar brands that they commonly use.



Scenario Based Product Classification

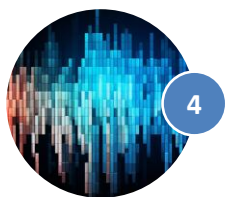
Women nowadays have diverse lifestyles and increasingly complex needs, driving the scenario-based categorization of sanitary pads, including sanitary pads designed for sports with highly absorbent, breathable and leakage-proof design; sanitary pads intended for white-collar workers that emphasize comfort and invisibility; sanitary pads designed for sleeping at night are longer and more comprehensive in size to ensure peace of mind and leakage prevention throughout the night; and sanitary pads intended for travelling are portable and individually packaged in a single-use package, etc. In the future, the scenario-based classification of sanitary pads will effectively enhance product performance and consumer satisfaction. The scenario-based categorization of sanitary pads will effectively improve products performance and consumer experience.

Future Trends of Feminine Hygiene Products Industry in Emerging Markets



Technological Innovation

Applying new materials and technologies has improved sanitary pads' comfort, absorbency and hygiene, including the use and popularization of super-absorbent fibers and antimicrobial technology. In the future, the brands will continue to promote the improvement of product performance through technological innovation to enhance the consumer experience.



Digital Management

Digital management can significantly improve the operational efficiency of sanitary pads producing companies in emerging markets by introducing digital technologies, including ERP (Enterprise Resource Planning) systems, CRM (Customer Relationship Management) systems, and supply chain management software. Companies can automate and refine management, enhance supply chain transparency, and improve customer experience. For instance, real-time data analysis and report generation can help companies optimize production planning and inventory management, reducing costs and improving efficiency. With the gradual optimization of the management system of sanitary pads enterprises in emerging markets, digital management will gradually become the mainstream.

Future Trends of Feminine Hygiene Products Industry in Emerging Markets



Optimization in Local Production and Supply Chain

Localized production not only reduces transportation costs but also better meets the needs of local markets. To reduce production costs and improve market responsiveness, more companies set up local factories and hire local employees for production, and optimize their supply chain management, including global sourcing and using digital supply chain management systems.



Gender Equality and Women Empowerment

Developing the sanitary pads industry in emerging markets promotes women's health and gender equality, female empowerment, and social progress. In the future, the government will increase investment in women's protection and implement tax exemptions and subsidy related policies. In addition, more sanitary pads brands will focus on women's empowerment and support women's health and rights through their products.



Chapter 4

Upgradation and Business Development of Hygiene Products Industry in Emerging Markets

Existing Pain Points and Upgrading Direction of Hygiene Products Industry in Emerging Markets



High Price Sensitivity and Limited Consumer Purchasing Power

Pain Point:

In emerging markets such as Africa and Southeast Asia, consumers have relatively low purchasing power and are highly price-sensitive, and many women still find it difficult to afford high-quality sanitary products.

Upgrade direction:

- Economy product line: Launch more cost-effective entry-level products to ensure basic functionality while controlling costs.
- Sell in smaller packages: Offer smaller package sizes to reduce the cost of a single purchase and increase market penetration.
- Localized production: Reduce dependence on imports, lower logistics costs and improve price competitiveness.



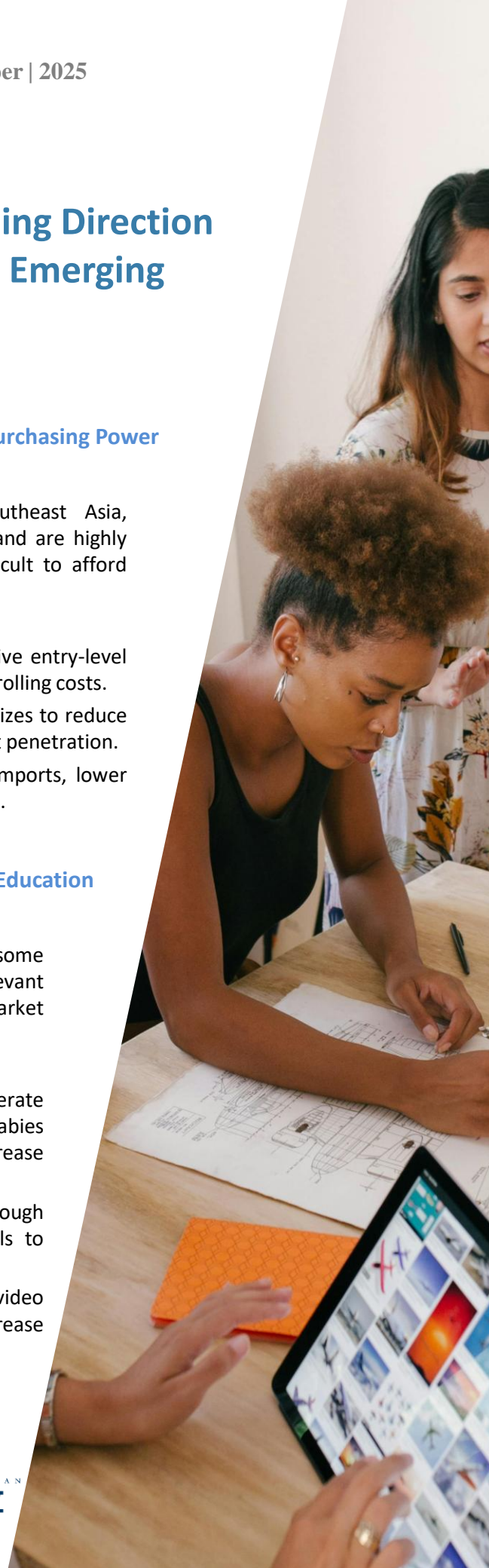
Low Penetration Rate and Insufficient Market Education

Pain Point:

The utilization of sanitary products is still low in some regions, and traditional attitudes, lack of relevant knowledge, and product accessibility limit market growth.

Upgrade direction:

- Health education promotion: Brands to cooperate with the government and NGOs to popularize babies and women's health knowledge and increase consumer awareness.
- Trial pack distribution: Provide trial packs through schools, community events and other channels to allow more women to experience the product.
- Digital marketing: Use social media and short video platforms to spread health knowledge and increase brand awareness.



Existing Pain Points and Upgrading Direction of Hygiene Products Industry in Emerging Markets



Inadequacy of Supply Chain and Channel Construction

Pain Point:

Inadequate logistics system and unstable supply chain of raw materials, resulting in large fluctuations in product prices and difficulty in ensuring continuous supply

Upgrade Direction:

- Local supply chain optimization: establish localized factories to reduce dependence on imported raw materials and improve supply chain stability.
- Intelligent logistics management: use data analysis to optimize inventory management and improve supply chain efficiency.
- Diversified Channel Expansion: Deeply expand local distributor and wholesaler channels, and develop new sales channels such as e-commerce to improve product accessibility.



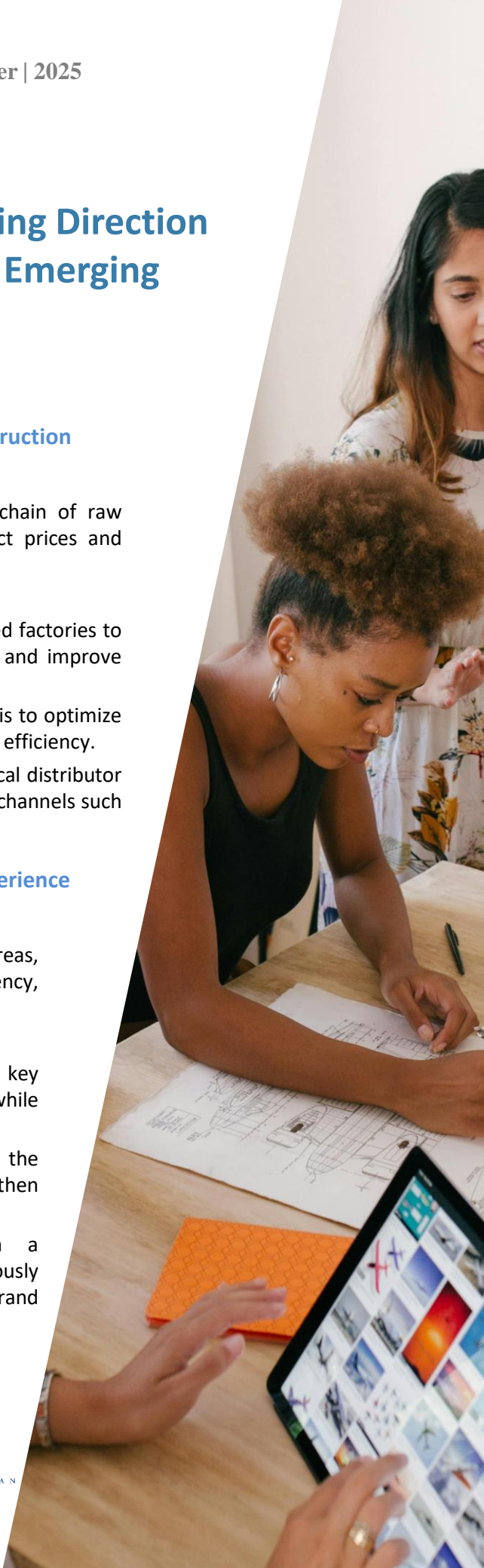
Insufficient Product Quality and Consumer Experience

Pain Point:

Low-quality or counterfeit products exist in some areas, and consumer demand for product comfort, absorbency, and multi-scene adaptability is gradually increasing

Upgrade direction:

- Develop cost-effective products: Improve key properties such as absorbency and breathability while controlling costs.
- Strengthen product regulation: Promote the establishment of industry standards, strengthen market regulation, and combat inferior products.
- Consumer feedback optimization: Establish a consumer feedback mechanism to continuously optimize the product experience and enhance brand loyalty.



Key Success Factors for Hygiene Products Companies in Emerging Markets

01 Supply Chain Integration Capability

Strong supply chain integration in emerging market hygiene companies enables cost control, efficient production, bulk purchasing, automation, optimized logistics, and rapid demand response. With advanced management and resilience, businesses can maintain competitiveness, avoid price wars, and enhance brand positioning in a highly competitive market.

02 Channel Expansion and Management Capability

Strong channel expansion and management enhance market coverage, adaptability, partner stability, and innovation for hygiene companies in emerging markets. Optimized strategies improve supply chain efficiency, brand trust, risk management, and regulatory compliance, driving sustained growth and competitive advantages.

03 Digital Management Capability

Digital management enhances efficiency in emerging market hygiene companies through ERP, CRM, and supply chain systems, enabling automation, transparency, and better customer experiences. Real-time data optimizes production and inventory, reducing costs and improving adaptability in competitive markets.

Key Success Factors for Hygiene Products Companies in Emerging Markets

04 Business Model Replication Capability

Business model replication enables hygiene companies to leverage proven strategies, reduce risks, and accelerate market expansion while ensuring consistent quality. It facilitates efficient resource allocation, partnership duplication, and talent management, strengthening market position and supporting global growth in competitive markets.

05 Degree of Localization

Localization is crucial for hygiene companies in emerging markets. Local manufacturing enhances market insight and marketing advantages, while hiring local staff improves expansion and social impact. Partnering with local distributors boosts penetration and responsiveness, and local factories reduce costs. Tailored product development ensures better suitability and consumer experience.

06 Brand Building Capability

Effective brand building enhances awareness, influences purchasing decisions, and creates differentiation through eco-friendly materials, high-tech fabrics, and quality control. A strong brand allows multi-channel marketing, premium pricing, and stronger bargaining power, making it a key success factor in emerging markets.

Key Success Factors for Hygiene Products Companies in Emerging Markets

07 Government-Business Relations and Industry Influence

Strong government-business relations in emerging markets enhance policy awareness, regulatory compliance, and industry influence. Companies benefit from tax incentives, subsidies, and industrial support, ensuring a stable competitive environment and boosting investor confidence.

08 Competitive Differentiation Strategy

In emerging markets, hygiene companies can achieve success through competitive differentiation by targeting regions with low competition and high potential, addressing diverse consumer needs, and leveraging rapid market growth for strategic expansion.

09 Organizational Management Capability

Flexible and efficient organizational management optimizes resource allocation, enhances market responsiveness, and strengthens risk control. In emerging markets, strong management enables rapid expansion, business model replication, and sustained competitiveness across diverse regions.

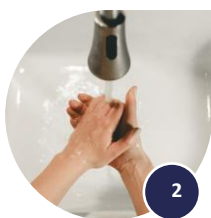
New Opportunities and Challenges for Hygiene Products Companies in Emerging Markets

Opportunities



Demographic Dividend and Market Growth

Demand for hygiene products continues to rise in emerging markets due to the large population base and rapid growth of female and infant groups. Accelerated urbanization and rising incomes are contributing to the expansion of the hygiene products market.



Increased Health and Hygiene Awareness

The government and social organizations have increased health and hygiene education, and consumer acceptance and demand for sanitary products have increased. Demand for personal hygiene care products has surged, driven by public health events.



Localized Production and Supply Chain Optimization

Establishment of local production plants reduces import tariffs, logistics costs and improves market responsiveness. Supply chain digitization and automation improves production efficiency, cost control and quality optimization.



Rise of E-commerce and TV Advertising

Increased smartphone and internet penetration has led to the rapid growth of sales channels such as social e-commerce and TV advertising, providing brands with wider market reach. Precise online marketing placement enhances brand awareness and consumer trust.



Increased Demand for High-end and Sustainable Products

Under the trend of consumption upgrading, the market for high-end sanitary products is expanding, with innovative products such as organic cotton, environmentally friendly materials, and antibacterial functions becoming more popular.

New Opportunities and Challenges for Hygiene Products Companies in Emerging Markets

Challenges



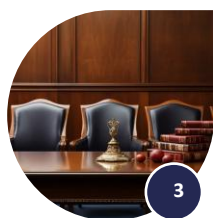
Intensified Market Competition

Global brands, local brands, and emerging brands are accelerating their entry into the market, and competition in the industry is heating up, increasing the pressure of price wars. Low-price competition mode is difficult to form long-term brand value, high value-added products and brand building have become the key.



Supply Chain Instability

Raw material price fluctuations (e.g. cotton pulp, SAP and other core materials) may affect cost control and profit margins. Adjustments in logistics, transportation and tariff policies may affect supply chain stability.



Increased Policy and Regulatory Compliance Requirements

Regulatory standards for sanitary products vary from country to country, and companies need to meet local regulatory requirements, increasing compliance costs. Imported products may be subject to stricter hygiene inspections, affecting the speed of market access.



Difficulty in Developing Consumer Awareness and Habits

Influenced by culture and education level, some consumers have not yet developed the habit of using sanitary products for a long period of time, and the cost of market education is high. Price sensitivity is high, brand premium ability is limited, how to enhance consumer loyalty has become the key.



Challenging Digitalization and Channel Transformation

Offline channels are still dominant, traditional distribution model is difficult to transform quickly, and the integration of online and offline channels faces challenges. Digital marketing requires precise placement strategies, and brands need to adapt to the rapidly changing social media and consumer trends.

Development Advice for Hygiene Products Companies in Emerging Markets

In emerging markets, the hygiene products industry is growing at a rapid pace but with many challenges. Enterprises need to develop systematic strategies around core elements such as industry regulations, consumer demand, and cost control to enhance competitiveness.

Solving Industry Pain Points and Optimizing Market Environment

- **Promote industry standards:** Jointly develop quality standards with government and industry associations to enhance product safety and consumer trust.
- **Enhance compliance:** Strengthen traceability, combating smuggling and counterfeit brands, and maintaining market order.
- **Optimize supply chain and logistics:** Cooperate with local logistics and establish regional warehousing centers to reduce transportation costs and improve supply efficiency.

1

Centered on Consumer Needs, Precise Market Positioning

- **Implementing the “One Country One Product” strategy:** Launch products tailored to local climates and habits.
- **Enhance product convenience:** Develop portable packaging and promote market education.
- **Brand matrix strategy:** Create a multi-tiered brand portfolio with differentiated positioning to cover all consumer segments.
- **User co-innovation:** Build an omni-channel engagement framework across the consumer lifecycle, creating a closed loop of demand insight, co-creation, and value feedback.

2

Development Advice for Hygiene Products Companies in Emerging Markets

In emerging markets, the hygiene products industry is growing at a rapid pace but with many challenges. Enterprises need to develop systematic strategies around core elements such as industry regulations, consumer demand, and cost control to enhance competitiveness.

Controlling Costs and Improving Operational Efficiency

- **Global Sourcing + Localized Supply Chain:** Reduce costs by sourcing raw materials globally (e.g., SAP, fluff pulp) while establishing localized factories to lower logistics and tariff expense.
- **Lean Production for Higher Efficiency:** Utilize automation and intelligent manufacturing to cut labor costs and boost efficiency
- **Flexible Pricing & Tiered Market Strategy:** Introduce high-end, mid-range, and budget product lines to align with different consumer segments, optimizing product portfolios and maximizing market reach.

3

Government Cooperation and Policy Grasp

- **Strive for government support:** Apply for policy support such as tax concessions, industrial subsidies and export incentives.
- **Strengthen policy research:** Establish a compliance team to follow up on market access, product certification, and tariff policy changes to reduce policy risks.
- **Deeply participate in the formulation of industry policies:** Join with local associations to promote the improvement of industry rules and enhance the discourse power.

4

Emerging Markets Hygiene Product White Paper

Feb. 2025

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