

Disposable Diapers Market



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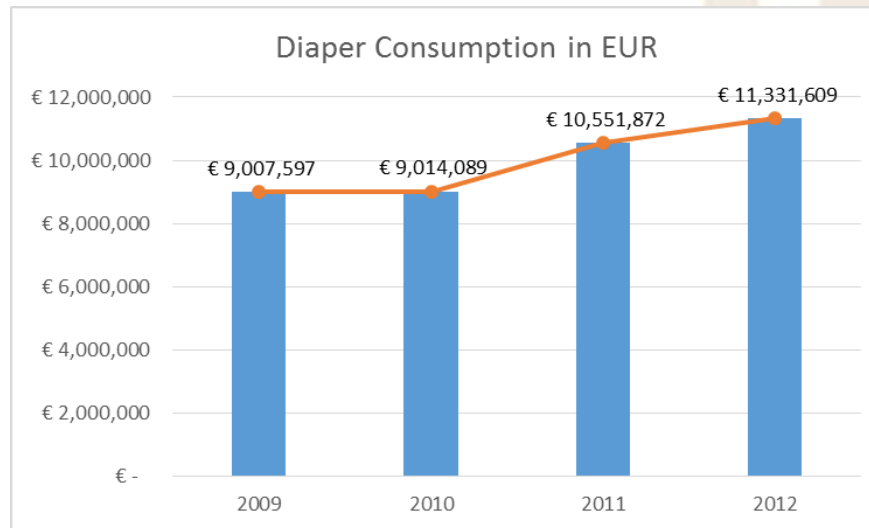
Disposable Diapers Market

- The disposable diapers market is closely related to the population dynamics in a country and its income level. The higher the income level, the higher will be the market penetration and hence the market size.
- The estimation of the market size has been based on a number of factors which include: 1) sub-categorized import data, 2) pricing data from two supermarkets chains in Kosovo, 3) data from the Statistical Office.
- Domestic production assumed at 3% of imports



- **Estimation of Total Disposable Diapers Market in Kosovo in Euros**

Diapers Market in Kosovo	2009	2010	2011	2012
Diaper Consumption in EUR	€ 9,007,597	€ 9,014,089	€ 10,551,872	€ 11,331,609
Weighted Average Price per Diaper				0.1879
Diapers Sold in Kosovo Annually				60,298,029







- The trends were projected using an assumption that the market will reach a penetration of 47% by the end of 2015 and was combined with the forecasts for the baby numbers until that date. The price was assumed to increase but not significantly. The following table presents the results.

	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
Diaper Consumption EUR	10,551,872	11,331,609	12,404,102	13,703,834	14,955,364
Weighted Average Price per Diaper		0.1879	0.190	0.195	0.200
Diapers sold in Kosovo Annually		60,298,029	65,284,746	70,276,074	74,776,818
Babies [0-2]	91,244	93,045	95,216	96,801	98,618
Diapers per Baby per Day during first 3 years		4.42	4.42	4.42	4.42
Maximum Market Potential (Diapers/Year)		150,108,692	153,611,166	156,169,053	159,099,613
Market Penetration		40.2%	43%	45%	47%

- Hence the market is expected to reach 15 Million Euros by the end of 2015.



- The following are the TOP 4 International Brands in the market

BRAND	COMPANY	EXPORTING COUNTRY	DISTRIBUTORS
	PROCTER & GAMBLE		MARKETING DISTRIBUTION
	PAKSEL	TURKEY	DIAMOND
	ROZI	TURKEY	ATEKS
	TOPRAK	TURKEY	UNION



Recura Financials

Anton Cetta 5a, 10000 Prishtina, Kosovo

Tel: +381 (0)38 221414; 777 800, 777 801

info@recura.biz

