

DIAPERS AND ABSORBENT COVERS

INVESTMENT OPPORTUNITY SCORECARD

HEALTHCARE AND LIFE SCIENCES

September 2021



Diapers and absorbent covers HS Code: 9619 and 4803

High Potential

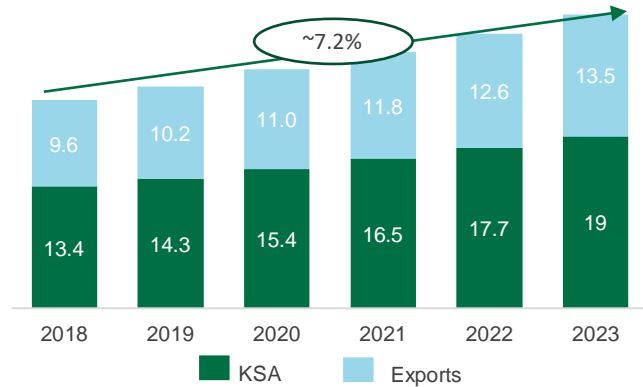
Moderate Potential

Low Potential

OPPORTUNITY'S DESCRIPTION: Localization of the manufacturing of Absorbing Pads (diapers, protective covers) in KSA

DEMAND

ADDRESSABLE KSA / REGIONAL MARKET DEMAND, \$ MN



INVESTMENT OVERVIEW

THERAPEUTIC APPLICATION

- Absorbing pads market is mainly driven by both rise in newborn population as well as ageing population in the Kingdom. Same in the form of absorbent covers are also used in hospital beds

VALUE PROPOSITION

- KSA has a solid foundation for its healthcare sector through well established ecosystem and incentive schemes for foreign OEMs entering the local market
- KSA is the largest spender on healthcare across the MENA region. The 2019 budget allocated more than \$45.86 Bn for Health and Social Development
- KSA has more than 495 hospitals, with a capacity of more than 76K beds

MARKET OVERVIEW

MARKET READINESS – CURRENT IMPORTERS

The Kingdom is currently mostly covered by a network of distributors and local subsidiaries, along with less than 3 known local manufacturers

CURRENT IMPORTERS

Egypt accounts for 27% of the supply, 18% Turkey, 14% Bahrain, the rest is supplied by a mix between Western Europe and Asia

EXISTING CAPABILITIES

- Technology available in kingdom

RAW MATERIALS:

- High absorbing cotton and fibres
- PU film for seal
- Nonwoven fibres

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