

Smart Diapers Market - Global Outlook and Forecast 2019-2024

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Abstracts

The global smart diapers market is expected to grow at a CAGR of more than 29% during the period 2018–2024.

The introduction of smart diapers is taking the diaper market to new heights. Smart diapers not only help to prevent wetness and spoilage, but they also monitor sleeping and breathing patterns. Manufacturers are developing fluff-less diapers that help to absorb extra liquids. They are manufacturing fluff-less ones in which the core is made of superabsorbent polymer merged between two layers. These help to absorb extra liquids. The demand is expected to increase, especially from child and adult segment during the forecast period. Hence, the adoption of baby diapers with less fluff pulp is likely to increase the demand for smart diapers. The incorporation of advanced technology such as smart diaper moisture detection system, which can sense humidity and notify parents through smartphones, is expected to have a positive influence on market growth during the forecast period. Also, the growing demand for adult diapers that can detect incontinence episodes is underpinning the growth of smart diapers globally. Therefore, adult smart diapers are expected to witness rapid growth in those countries that have a significant population aging 60 years or above.

The following factors are likely to contribute to the growth of the smart diapers market during the forecast period:

Advancements in Healthcare Declining Infant Mortality

High demand from the adult incontinence care market

Improvements in material and sensor designs

This market research report on the global smart diapers market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by end-users (children and adult and Elderly), distribution channels (retail and online), geography (APAC, Europe, Latin America, MEA, and North America).

The study considers the present scenario of the smart diapers market dynamics for the period 2018-2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The report covers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Smart Diapers Market: Segmentation

This market research report includes detailed market segmentation by end-users, distribution, and geography. The ability of adult diapers to eliminate the disconnect between the caretaker and the patient is one of the major factors for the growth of the adults and elderly segment. The segment is likely to emerge as the largest end-user of the smart diapers market during the forecast period. Vendors have introduced smart diaper sensors along with mobile applications, which allow the caretaker or healthcare professionals to track and monitor the diaper condition. Thus, smart diapers enable caretakers with timely alerts to better alleviate health challenges arising due to continuous diaper usage. Such advancements allow smart diaper companies to cater their products to several adult and elderly consumer segments, thereby contributing to the growth of smart diapers market. Nuclear families and working parents are the major potential end-users of smart baby diapers.

With the advent of e-commerce and specialty stores for baby products, the diaper business has changed in the last 10 years. Offline channels such as supermarket and baby specialty stores continue to dominate the market, however, the online presence is increasing and is expected to grow faster than offline distribution channels. The emergence of several start-ups that offer incontinence solutions is likely to increase the market share online. Manufacturers have strengthened their distribution channels across the world and ensure the easy availability of diapers.

Market Segmentation by End-users

Children

Adult and Elderly

Market Segmentation by Distribution Channel

Online

Retail

Smart Diapers Market: Geography

The demographic shift from rural to urban areas is driving the demand for smart diapers in the APAC region

Factors such as increasing health awareness, declining infant mortality rates, and the growing women participation in the workforce are driving the demand for the US market. The high adoption of innovative and connected care products is likely to boost the demand for smart diapers in the region. Further, the increased demand from non-profit organizations (which provide diapers to the low-income group) and the increasing penetration of disposable ones are equally boosting the smart baby diapers market. Also, the increasing adoption of disposable products is expected to push the growth of smart diaper sensors in the region.

The smart diapers market in Europe is expected to grow at a CAGR of around 29% during the forecast period. The increasing literacy rate among women and the boom in online baby specialty stores are the key factors driving the Europe smart diapers market. Europe is witnessing an increase in the per capita disposable income of end-consumers, driving the retail market in the region. Germany has a high potential for smart diaper and sensors in both end-user segments of babies and elderly users.

The smart diapers market in APAC is likely to witness growth due to the high adoption of innovative care technology for babies, adults, and elderly care products. The APAC market has high growth opportunities in the adult segment as the leading markets have a high percentage of the elderly population. Key countries such as China, South Korea, and Japan in APAC are witnessing an increase in the population, rise in the purchasing power, improvement in healthcare standards, which are leading to the decline in the

infant mortality rate. Also, the demographic shift from rural to urban area is pushing the demand in these countries.

Further, the growth in urbanization and the rise in disposable income in MEA are the major factors contributing to the growth of the MEA market. The annual urban population is increasing by 3.5% and 4% in Africa and in the Middle East, respectively. There has been an increase in the number of expats in the Middle East due to high-income opportunities. Besides, people living in urban areas are more aware of hygiene, thereby opting for baby diapers. Also, the birth rate in MEA is on the rise, leading to a high demand in the region.

In Latin America, Mexico and Brazil are bolstering the smart diapers market. The increasing population, the growing women workforce, and the growing dual-income households are driving the smart diapers market in the region. The consumers in Brazil are moving away from expensive and luxury products to value for money products and the same hold true for premium diapers. The Brazilian residents have become cost-conscious and looking for products that are inexpensive and provide the value for money. Vendors are relying on smart communication advertisements to increase product awareness and introducing new products to their core audience.

Market Segmentation by Geography

APAC

China

Japan

South Korea

Europe

Germany

France

UK

Italy

Nordic

North America

US

Canada

MEA

Saudi Arabia

UAE

Latin America

Brazil

Mexico

Key Vendor Analysis

The smart diapers market is characterized by the presence of diversified international, regional, and local vendors. However, as global players increase their footprint in the market with their huge infrastructure and R&D support, regional vendors may find it increasingly difficult to compete in terms of reliability, technology, and price. Further, vendors are focusing to increase their presence in the region, mitigate the loss of patent protection, and achieve high economies of scale. The competitive environment in the market is likely to intensify further with an increase in innovations and M&As.

Key Vendors

Kimberly-Clark

P&G

Other Prominent Vendors

Smardii

Opro9

Abena

Sinopulsar

Monit

Simavita

Fit Assist Medical

DigiSense

Eldersense

Hunan Cosom

Pixie Scientific

Sensassure

Key Market Insights

The analysis of the global smart diapers market provides market sizing and growth opportunities for the forecast period 2019–2024.

Offers market sizing and growth prospects of the market for the forecast period 2019–2024.

Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the market.

Includes a detailed analysis of market growth drivers, challenges, and

investment opportunities.

Delivers a complete overview of market segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the global smart diapers market.

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