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Global Composite Absorbent Cores for Hygiene Products Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Composite Absorbent Cores for Hygiene Products market size is expected to reach $ 3268 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Composite Absorbent Cores for Hygiene Products are preformed functional absorbent materials designed as the primary liquid acquisition, distribution, storage and retention structure in disposable hygiene products. These materials are typically produced from superabsorbent polymers, superabsorbent fibers, fluff pulp, tissue, airlaid paper and nonwoven substrates through airlaid forming, lamination, wet-laid forming, thermobonding or related composite processes. Commercial products are commonly supplied in rolls, sheets or preformed core structures, with basis weight, SAP content, density, thickness and liquid-management performance adjusted to downstream product requirements. Existing commercial specifications span a broad basis-weight range, with products such as airlaid absorbent cores available from approximately 75 to 800 gsm and SAP-containing thermobond cores extending across similarly broad performance grades. Composite Absorbent Cores for Hygiene Products are primarily used in baby diapers, feminine hygiene products, adult incontinence products, underpads and other disposable absorbent hygiene products.

Key Findings

Global sales volume was approximately 590 thousand tons in 2025 and is estimated at approximately 620 thousand tons in 2026

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The global weighted average selling price increased from approximately US$3.55/kg in 2025 to approximately US$3.60/kg in 2026

SAP-based composite absorbent cores remain the mainstream commercial product structure, while SAF-based and fluff-reduced technologies represent emerging alternatives

The competitive landscape comprises 27 verified core manufacturers, with production capacity concentrated in Asia, Europe and North America

Market Trends

Composite Absorbent Cores for Hygiene Products are moving toward thinner structures, higher effective use of superabsorbent materials, lower fluff-pulp content and greater integration of fluid acquisition, distribution and storage functions. Airlaid remains an established platform, while laminated SAP sheet, wet-laid composite core and thermobond structures are expanding the range of design options available to hygiene converters. Leading commercial products increasingly emphasize ultra-thin profiles, improved core integrity, reduced dusting, faster liquid acquisition and more efficient SAP utilization. EAM markets hydrogen-bonded airlaid cores containing fluff pulp, SAP and tissue across a wide basis-weight range, while TWE's Amphibia integrates SAP into a multilayer thermobond structure and is positioned for baby care, femcare and incontinence products. Material development is also shifting from simply maximizing absorption capacity toward balancing acquisition speed, distribution, rewet performance, flexibility and manufacturing efficiency, particularly as hygiene brands pursue thinner products and higher line speeds.

Market Dynamics

Drivers

Growth is supported by expanding consumption of disposable hygiene products, rising penetration of adult incontinence products, continued product premiumization and the conversion of conventional bulky fluff-pulp cores toward thinner preformed composite structures. Preformed cores allow converters to reduce reliance on hammer mills and complex in-line pulp handling while improving dimensional consistency, dust control and high-speed convertibility. Commercial suppliers increasingly position absorbent cores across baby care, feminine hygiene and adult care, confirming that common composite-

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core technologies can serve multiple high-volume hygiene categories.

Restraints

The market remains sensitive to SAP, pulp, tissue, nonwoven and energy costs, while the relatively concentrated supply of specialty SAP and high-performance fiber materials can amplify raw-material price volatility. Traditional in-line fluff pulp and SAP core formation remains economically competitive for large vertically integrated hygiene manufacturers, particularly where existing equipment has already been depreciated. Composite cores also require careful optimization between absorption capacity, acquisition speed, core integrity and basis weight; increasing SAP loading alone does not necessarily improve overall product performance and can create gel blocking or liquid-distribution constraints.

Opportunities

The strongest opportunities are associated with fluff-reduced and fluffless hygiene designs, ultra-thin feminine care products, premium baby diapers and the structurally expanding adult incontinence segment. Suppliers able to combine high SAP efficiency with lower basis weight, reliable high-speed converting and integrated acquisition-distribution functions can capture a larger portion of the value created by hygiene product redesign. SAF-based cores, alternative superabsorbent materials and wet-laid or thermobond structures also provide opportunities for differentiated products where flexibility, low dust generation or reduced pulp content is prioritized. TWE and KNH already commercialize SAP-containing core structures across baby, feminine and adult-care applications, demonstrating the multi-application potential of these technologies.

Challenges

The principal challenge is the lack of a single standardized core architecture across hygiene categories. Baby diapers, sanitary napkins, adult incontinence products and underpads require substantially different basis weights, SAP ratios, acquisition characteristics and mechanical properties, which limits economies of scale for highly customized grades. Qualification cycles with major hygiene manufacturers can also be lengthy because core materials directly affect leakage protection, dryness, comfort and high-speed converting stability. At the same time, capacity expansion in China, India and Southeast Asia is increasing price competition in conventional SAP sheet and

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laminated-core products, raising the importance of process know-how and differentiated fluid-management performance.

Industry Chain Analysis

The upstream chain consists primarily of superabsorbent polymers, superabsorbent fibers, fluff pulp, tissue, airlaid paper, nonwoven substrates, bicomponent fibers, binders and adhesives. SAP and pulp remain major determinants of material cost, while specialized fibers, bonding systems and substrate combinations influence acquisition, distribution, integrity and softness. Midstream Composite Absorbent Cores for Hygiene Products manufacturers convert these materials through airlaid forming, lamination, wet-laid forming, thermobonding and related processes into roll goods, sheets or preformed core structures. Value creation is concentrated in material formulation, SAP distribution, multilayer architecture, basis-weight control, bonding technology and the ability to maintain uniform performance at industrial production speeds.

Downstream customers are primarily baby diaper, feminine hygiene, adult incontinence and underpad manufacturers. Composite-core suppliers create additional value by enabling thinner product design, reducing in-line pulp-processing requirements, simplifying converting operations and improving logistics efficiency. EAM notes that thinner airlaid cores can increase the quantity of material shipped in the same container, while TWE highlights process benefits associated with reducing conventional fluff-core handling. As a result, supplier competitiveness depends not only on raw-material purchasing costs but also on formulation capability, process stability, customization and technical support during downstream product development.

Segment Insights

By product type, airlaid composite absorbent cores represent the most mature international technology route, supported by established commercial suppliers in North America, Europe, Japan and Asia. Laminated composite absorbent cores are particularly important in Asian supply chains because SAP can be incorporated between tissue, airlaid paper or nonwoven layers to create thin roll-format materials. Wet-laid composite cores have developed into a differentiated route in China, while thermobond composite cores provide an alternative for multilayer and fluff-reduced structures. The relative importance of each technology varies by region and downstream product design rather than following one universal specification.

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By superabsorbent material, SAP-based cores account for the clear majority of commercial products because of the established supply chain, high absorption capacity and compatibility with airlaid, laminated and wet-laid structures. SAF-based products remain a smaller but technically differentiated segment, particularly where uniform fiber-level absorbency, flexibility and reduced particulate handling are required. KNH's SAP Sheet combines absorbent paper, pulp and polymer absorbent powder, while TWE's thermobond core physically integrates SAP into a multilayer nonwoven structure, illustrating the diversity within the SAP-based segment itself.

Downstream Market Opportunities

Demand is concentrated in baby diapers, feminine hygiene products and adult incontinence products, with underpads forming an additional high-absorbency application. Baby diaper customers emphasize thinness, integrity and high-speed conversion; feminine hygiene applications place greater emphasis on rapid acquisition, low rewet and discreet profiles; adult incontinence products require higher storage capacity together with comfort and odor-control performance. Current supplier portfolios increasingly span all three major personal-hygiene categories, allowing common core platforms to be adapted through changes in basis weight, SAP loading, structure and dimensions. Adult incontinence represents an especially attractive long-term opportunity because aging populations and improved product acceptance support continued demand for high-performance absorbent structures.

Regional Insights

Asia-Pacific is the principal manufacturing and consumption center for Composite Absorbent Cores for Hygiene Products, supported by large-scale hygiene manufacturing in China, Japan, South Korea, India, Indonesia and China Taiwan. China has developed a particularly broad supplier base spanning laminated SAP cores, SAP paper, wet-laid cores and vertically integrated hygiene-material production, while India and Southeast Asia are adding local SAP sheet and ultra-thin core capacity. Japan and China Taiwan remain important in higher-specification airlaid and SAP sheet technologies. North America and Western Europe retain strong positions in engineered airlaid, multilayer cores, SAF-based materials and process-intensive premium products, with suppliers such as EAM, Magnera, McAirlaid's, TWE and Technical Absorbents supporting established global hygiene customers.

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Competitive Landscape Analysis

The competitive landscape is fragmented across global engineered-material groups, specialist airlaid manufacturers and regional SAP sheet or composite-core producers. The study identifies 27 verified core manufacturers. North American and European companies generally compete through airlaid technology, proprietary bonding processes, product consistency and close technical cooperation with multinational hygiene manufacturers, while Asian suppliers have expanded rapidly in laminated SAP sheet, wet-laid core and cost-efficient high-volume manufacturing. EAM's NovaThin and NovaZorb, TWE's Amphibia and KNH's SAP Sheet illustrate three different competitive approaches: engineered airlaid cores, integrated multilayer thermobond structures and SAP-containing sheet materials. Competition is increasingly shifting from basic absorbency toward total core efficiency, including lower basis weight, optimized SAP utilization, thinner finished products, manufacturing stability and customized fluid-management performance. Scale remains important, but formulation expertise, intellectual property, customer qualification experience and the ability to support high-speed converting are becoming increasingly important barriers to entry.

Report Scope

This report studies the global Composite Absorbent Cores for Hygiene Products production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Composite Absorbent Cores for Hygiene Products and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Composite Absorbent Cores for Hygiene Products that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Composite Absorbent Cores for Hygiene Products total production and demand, 2021-2032, (Tons)

Global Composite Absorbent Cores for Hygiene Products total production value, 2021-2032, (USD Million)

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Global Composite Absorbent Cores for Hygiene Products production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Composite Absorbent Cores for Hygiene Products consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Composite Absorbent Cores for Hygiene Products domestic production, consumption, key domestic manufacturers and share

Global Composite Absorbent Cores for Hygiene Products production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Composite Absorbent Cores for Hygiene Products production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Composite Absorbent Cores for Hygiene Products production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Composite Absorbent Cores for Hygiene Products market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EAM Corporation, Gelok International, Magnera Corporation, M&J Airlaid Products A/S, McAirlaid's Vliesstoffe GmbH, MAIN S.p.A., Magic S.p.A., TWE Group GmbH, Technical Absorbents Limited, Airlaid ApS, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Composite Absorbent Cores for Hygiene Products market

Detailed Segmentation:

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Composite Absorbent Cores for Hygiene Products Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Composite Absorbent Cores for Hygiene Products Market, Segmentation by Type:

Airlaid Composite Absorbent Core

Laminated Composite Absorbent Core

Wet-laid Composite Absorbent Core

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Thermobond Composite Absorbent Core

Other

Global Composite Absorbent Cores for Hygiene Products Market, Segmentation by Superabsorbent Material:

SAP-based Composite Absorbent Core

SAF-based Composite Absorbent Core

Other

Global Composite Absorbent Cores for Hygiene Products Market, Segmentation by Application:

Baby Diapers

Feminine Hygiene Products

Adult Incontinence Products

Underpads

Other

Companies Profiled:

EAM Corporation

Gelok International

Magnera Corporation

M&J Airlaid Products A/S

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McAirlaid's Vliesstoffe GmbH

MAIN S.p.A.

Magic S.p.A.

TWE Group GmbH

Technical Absorbents Limited

Airlaid ApS

Fitesa

OJI KINOCLOTH CO., LTD.

WANGBO COMPANY

PT Multi Spunindo Jaya Tbk

ACE NONWOVEN PVT LTD

Cliniva Hygiene India Industries

Celligo Natural Fibres Private Limited

KNH Enterprise Co., Ltd.

Guangdong Meideng New Material Technology Co., Ltd.

Nuochen Gufen Youxian Gongsi

Shanghai Wo Run Zhi Industrial Development Co., Ltd.

Longyou Jieli New Material Technology Co., Ltd.

Fujian Province Qiao Dong New Materials Co., Ltd.

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Fujian Tengbang New Materials Co., Ltd.

Zhejiang Zhenyu Water Absorbent Material Technology Co., Ltd.

Jiashan Qinghua Health Compound Materials Co., Ltd.

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Key Questions Answered

1. How big is the global Composite Absorbent Cores for Hygiene Products market?
2. What is the demand of the global Composite Absorbent Cores for Hygiene Products market?
3. What is the year over year growth of the global Composite Absorbent Cores for Hygiene Products market?
4. What is the total value of the global Composite Absorbent Cores for Hygiene Products market?
5. Who are the Major Players in the global Composite Absorbent Cores for Hygiene Products market?
6. What are the growth factors driving the market demand?

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