

# **Diaper Market in India Report by Product Type (Baby Diapers, Adult Diapers), Distribution Channel (Pharmacies, Online Stores, Supermarkets and Hypermarkets, Convenience Stores, and Others), and Region 2024-2032**

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## **Abstracts**

The diaper market in India size reached US\$ 1.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.0 Billion by 2032, exhibiting a growth rate (CAGR) of 7% during 2024-2032. The rising concerns among parents regarding the overall health and hygiene of their babies, growing prevalence of various health conditions, and increasing consciousness regarding personal hygiene are among the key factors driving the market growth.

Diapers are specially designed absorbent undergarments made from a combination of materials like cotton, tissue papers, polyester nonwoven fabrics, hemp, bamboo, plastic, and polyethylene. They incorporate super absorbing polymers (SAPs) such as sodium polyacrylate and have multiple layers, including an inner lining of polypropylene, to effectively retain and absorb urine and feces, preventing leakage and keeping the outer cloth clean. This makes them suitable for infants, toddlers, and individuals with urinary incontinence, diarrhea, mobility impairment, dementia, and disabilities, as they allow for urination and defecation without using a toilet. With various sizes, shapes, and weights available, diapers cater to the diverse needs of users by improving their fluid absorption and retention capabilities.

The diaper market in India is primarily driven by the rising concern among parents regarding the overall health and hygiene of their babies. In line with this, the growing awareness of the benefits of adult diapers among the masses are contributing to the market. Moreover, the introduction of organic diaper variants made with incorporating

premium materials and fabric for sensitive skin is fueling the market. In addition to this, the emergence of smart diapers equipped with sensors to detect leakage and prevent skin problems, along with nanotechnology are creating a positive market outlook. Furthermore, increasing environmental concerns and awareness of the harmful impact of conventional diapers are fueling the demand for ecofriendly diapers and sustainable packaging, thereby contributing to the market. Some of the other factors such as high birth rates, product innovations, easy product availability through retail channels, growing geriatric population, rising consumer expenditure, improving living standards, and aggressive promotional strategies are propelling the market.

#### Diaper Market in India Trends/Drivers:

##### Growing Prevalence of Various Health Conditions Across The Country

The market for diapers in India is experiencing significant growth due to the growing prevalence of various health conditions. Functional and cognitive impairment, constipation, urinary tract infections (UTI), and urinary incontinence, particularly among the aging population, are major contributors to this growth. As individuals face these health challenges, the demand for diapers has increased substantially. The need for reliable and convenient solutions to manage these conditions has propelled the market forward. Diapers provide an effective way to maintain hygiene and manage incontinence-related issues, making them essential for individuals with functional and cognitive impairment or those affected by UTIs and constipation. This rise in demand is expected to continue as the aging population expands and the awareness of these health conditions increases.

##### Increasing Consciousness Regarding Personal Hygiene Among the Masses

One of the key factors driving the demand for diapers in India is the increasing consciousness about personal hygiene among individuals. As consumers become more aware of the importance of maintaining cleanliness and hygiene, the demand for diapers has seen significant growth. This heightened consciousness is evident across various age groups and demographics, as individuals prioritize their personal well-being and comfort. Diapers provide a convenient and hygienic solution for managing bodily waste, ensuring individuals can maintain a clean and comfortable environment. Moreover, the awareness of the health benefits associated with using diapers, such as preventing skin irritations and infections, has further boosted the demand. As the focus on personal hygiene continues to grow, the demand for diapers in India is expected to see sustained growth in the foreseeable future.

## Diaper Market in India Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the diaper market in India report, along with forecasts at the country and regional levels from 2024-2032. Our report has categorized the market based on product type and distribution channel.

### Breakup by Product Type:

- Baby Diapers
  - Baby Disposable Diaper
  - Baby Training Diaper
  - Baby Cloth Diaper
  - Baby Swim Pants
  - Others
- Adult Diapers
  - Adult Pad Type Diaper
  - Adult Flat Type Diaper
  - Adult Pant Type Diaper

Baby Diapers represent the most widely used product type

The report has provided a detailed breakup and analysis of the market based on the product type. This includes baby diapers (baby disposable diaper, baby training diaper, baby cloth diaper, baby swim pants, and others) and adult diapers (adult pad type, adult flat type, and adult pant type diapers). According to the report, baby diapers represented the largest segment.

The baby diaper segment in the Indian market is majorly driven by factors such as the increasing birth rate and population growth, rising disposable income, and changing lifestyles. Rapid urbanization and the prevalence of nuclear families with working parents contribute to the demand for convenient diapering solutions. Additionally, the growing awareness about hygiene and convenience, coupled with product innovation and effective marketing strategies, further fuel the adoption of baby diapers in India.

On the other hand, the Indian market for adult diapers is primarily driven by the aging population and increased life expectancy, leading to a higher demand for these products. Growing awareness of elderly care and the importance of maintaining hygiene and comfort have also contributed to the increased adoption of adult diapers. The rising prevalence of chronic conditions, urbanization, and changing lifestyles that result in

limited availability of caregivers have further fueled the demand. Furthermore, advancements in product features and improved availability through retail channels and e-commerce platforms have facilitated the growth of the adult diaper segment in India.

Breakup by Distribution Channel:

- Pharmacies
- Online Stores
- Supermarkets and Hypermarkets
- Convenience Stores
- Others

A detailed breakup and analysis of the Saudi Arabia LED lights market has been provided based on distribution channels, This includes pharmacies, online stores, supermarkets and hypermarkets, convenience stores, and others.

Pharmacies are widely preferred due to the enhanced convenience and accessibility provided by them in residential areas, offering parents with an easy option for purchasing diapers alongside other healthcare products. The trust and expertise associated with pharmacies make them a preferred choice for parents, who value the quality and reliability of healthcare-related items. Moreover, parents often seek professional advice from pharmacists when selecting the right diaper brand or type, especially if their child has specific needs or allergies.

Besides this, online stores have become a prominent force in the diaper market, offering a wide range of brands, sizes, and types for parents to choose from. The convenience and time-saving aspect of online shopping make it a popular option, allowing parents to browse and purchase diapers from the comfort of their own homes. Furthermore, online stores often provide attractive discounts, promotions, and bundle deals, making it an appealing choice for price-conscious consumers seeking affordability.

Moreover, supermarkets and hypermarkets play a crucial role in the diaper market as one-stop shopping destinations that cater to various consumer needs, including diapers. Parents appreciate the convenience of purchasing diapers alongside their regular groceries, saving time and effort. These stores also offer competitive pricing on diapers due to their large-scale operations and purchasing power. With a variety of brands available, parents have the flexibility to select diapers based on their preferences, budget, or specific requirements.

On the other hand, convenience stores serve as convenient and accessible options for parents in urgent need of diapers. Their proximity to residential areas and extended operating hours ensure that parents can quickly purchase diapers whenever required. These stores cater to immediate needs, making it possible for parents to acquire diapers without having to plan or wait for delivery. Additionally, convenience stores may encourage impulse purchases, as parents may spontaneously buy diapers when they run low on supplies.

#### Breakup by Region:

West and Central India

South India

North India

East and North-East

West and Central India exhibits a clear dominance, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include West and Central India, South India, North India, and East and North-East India. According to the report, West and Central India represented the largest market share.

West and Central India held the biggest market share since the region is witnessing an expansion of the population and rising number of people from other parts of India settling in this region. Moreover, inflating disposable income levels of the consumers leading to increased purchasing power and affordability for baby care products like diapers, are resulting in higher demand. Also, rapid urbanization and changing lifestyles have fueled the demand for convenience and hygiene products, making diapers an essential item for the consumers in the West and Central India region. Furthermore, the easy availability of a diverse range of diaper options, catering to various price points and preferences, has further stimulated the demand for diapers in the West and Central India region.

#### Competitive Landscape:

The key players in the market are focusing on product innovation, introducing diapers with improved features and specialized variants. They are also investing in robust marketing and advertising campaigns to create brand awareness and highlight product benefits. The key companies are also expanding their distribution networks, partnering

with various retailers and exploring e-commerce platforms to introduce competitive pricing and loyalty programs. Moreover, they are prioritizing consumer education, engaging through social media, blogs, and customer service to address concerns. Furthermore, they are also participating in sustainability initiatives, such as eco-friendly materials and responsible disposal practices, to cater to the evolving consumer demands.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

The Procter & Gamble Company, India

Unicharm India Pvt. Ltd

Kimberly-Clark India Pvt. Ltd

Nobel Hygiene Pvt. Ltd.

Pan Healthcare Pvt. Ltd. (PHPL)

Swara Baby Products Pvt. Ltd.

Millennium Baby Care Pvt. Ltd.

Uniclan Healthcare Pvt. Ltd.

Luzon Healthcare LLP

Kangaroo Healthcare

RGI Meditech Pvt. Ltd.

Tataria Hygiene

Myra Hygiene Products Pvt Ltd.

Kamal Healthcare Products Pvt. Ltd.

Seni (TZMO SA)

### Key Questions Answered in This Report

1. What was the size of the diaper market in India in 2023?
2. What is the expected growth rate of the diaper market in India during 2024-2032?
3. What are the key factors driving the diaper market in India?
4. What has been the impact of COVID-19 on the diaper market in India?
5. What is the breakup of the diaper market in India based on the product type?
6. What is the breakup of the diaper market in India based on the distribution channel?
7. What are the key regions in the diaper market in India?
8. Who are the key players/companies in the diaper market in India?

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