

India Adult Diaper Market Assessment, By Product Type [Reusable Diapers, Disposable Diapers], By Style [Pants/Pull-Up Style, Pad Style, Flat Style, Others], By Material [Cotton, Non-Woven Fabric, Fluff Pulp, Others], By Size [Small, Medium, Large, Extra-Large, 2XL], By Price Range [Economy, Mid-Range, Premium], By Category [Male, Female, Unisex], By End-user [Residential, Hospital & Clinics, Others], By Distribution Channel [Hypermarkets/Supermarkets, Convenience Stores, Drug Stores/ Pharmacies, Online], By Region, Opportunities and Forecast, FY2017-FY2031

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Abstracts

India adult diaper market size was valued at USD 161.1 million in FY2023, which is expected to reach USD 383.5 million in FY2031, with a CAGR of 11.45% for the forecast period between FY2024 and FY2031. An adult diaper is a specifically designed absorbent product used by adults facing incontinence challenges, which refers to difficulties in controlling bladder or bowel movements. These adult diapers are distinct from those meant for infants and toddlers in terms of their size, fit, and absorption capacity. They are crafted using high-performance absorbent materials to effectively manage varying levels of incontinence, ensuring the wearer's comfort and dignity. These diapers come in several styles, including pull-up versions and adhesive tabs, catering to user preferences and incontinence severity. Adult diapers are essential for numerous individuals, including the elderly, those with specific medical conditions, and

post-surgery patients, as they enable them to lead confident, hygienic, and active lives without discomfort or hindrance.

India is undergoing significant urbanization as more individuals move to urban areas for improved employment opportunities and living conditions. This rapid urbanization often leads to busy lifestyles and increased stress levels, which can result in the early onset of various health issues, including incontinence. Consequently, the demand for adult diapers is on the rise in India. Furthermore, post-surgical patients, particularly those who have undergone procedures related to the prostate, bladder, or colon, require these products during their recovery phase.

The emergence of e-commerce platforms has made it more convenient for consumers to purchase adult diapers discreetly. The online shopping experience, with its wide product selection, reviews, and discounts, has encouraged more people to opt for adult diapers, further influencing the market. Additionally, the proliferation of hospitals, nursing homes, and healthcare institutions across India contributes significantly to the demand for adult diapers. Moreover, aggressive advertising campaigns to educate consumers about the benefits of using adult diapers create a positive outlook for the market.

For example, on May 10, 2023, Nobel Hygiene Pvt Ltd introduced a groundbreaking product through their flagship brand, Friends - India's top-rated adult diaper brand. This innovative offering, named Friends UltraThinZ, represents the country's first 'slim' disposable absorbent underpants. Friends UltraThinZ is strategically designed to cater to a younger demographic facing mild incontinence concerns associated with obesity, prostate complications, and postpartum issues. Furthermore, it is an effective solution for managing heavy blood flow following childbirth, during menopause, and for individuals with endometriosis.

Growing Health Awareness Initiatives for Adult Diaper

Growing health awareness initiatives in India drive the adult diaper market. These initiatives, often conducted in collaboration with healthcare organizations, aim to educate the public about the link between various medical conditions and incontinence. By emphasizing the importance of managing incontinence for overall health and well-being, these campaigns encourage individuals with conditions like diabetes, prostate problems, and obesity to seek solutions like adult diapers. Heightened awareness reduces stigma and prompts healthcare providers to recommend adult diapers as part of comprehensive patient care.

As a result, the adult diaper market is experiencing a surge in demand as more individuals recognize these products' role in maintaining their health, hygiene, and quality of life. For example, in July 2023, ADbhoot introduced a dynamic and lively marketing campaign for Liberty Adult Diaper, reshaping society's perception of aging and inspiring adults to embrace life with Vigor. This initiative seeks to challenge the stereotypes often depicting elderly individuals as helpless, highlighting their zest for life and honoring their independence instead.

Growing Popularity of Online Channels

The India adult diaper market has witnessed a significant shift in consumer preferences towards online channels, reflecting the growing popularity of e-commerce platforms. Online channels have become a preferred avenue for purchasing adult diapers due to their convenience, wide product selection, and discreet shopping experience. Consumers can explore a diverse range of brands, sizes, and features, read user reviews, and make informed decisions from the comfort and privacy of their homes. Furthermore, the availability of discounts, subscription models, and doorstep delivery options has made online shopping for adult diapers even more appealing.

The ongoing digital transformation, coupled with the ease and accessibility of online platforms, is expected to continue driving the market's growth through increased consumer adoption of adult diapers in India. For example, the growing popularity of online channels, such as Amazon, has significantly impacted the accessibility and affordability of products like Glider Diaper Pants. Online platforms like Amazon offer competitive pricing, exclusive discounts, and bundling options during sales events. These cost-effective incentives attract consumers seeking quality diaper pants, providing them with greater value for their purchases while contributing to the surge in online sales for such products.

Launch of Innovative Products

The India adult diaper market has recently witnessed a surge in innovative product launches, driving consumer interest and market expansion. Manufacturers are introducing advanced, high-performance adult diaper variants tailored to address specific needs. These innovations include ultra-thin and discreet designs for enhanced comfort and wearability and eco-friendly and sustainable materials to align with growing environmental consciousness, and specialized variants for post-surgery recovery or active lifestyles. Furthermore, integrating smart technologies like moisture sensors and

mobile apps for incontinence management is revolutionizing the market, offering users greater control and convenience.

These innovative products cater to a broader demographic, reducing the stigma associated with incontinence propelling the growth of the India adult diaper market. For example, in 2022, The Bureau of Indian Standards (BIS) announced that it had granted the inaugural license to a company located in Rajasthan to produce disposable incontinence adult diapers, conforming to BIS specifications and allowing them to utilize the quality symbol Standard Mark. According to a statement released by BIS, the first nationwide license for disposable incontinence adult diapers has been awarded to Paramount Surgimed Ltd, situated in Bhiwadi.

Impact of COVID-19

Before the pandemic, India's adult diaper market exhibited gradual growth, driven by factors such as heightened awareness of incontinence issues among the elderly, improvements in healthcare infrastructure, and growing aging population. Despite promising signs, this market remained somewhat niche due to the lack of awareness among potential users regarding the availability and advantages of adult diapers. Traditional retail channels predominantly dictated sales, while the e-commerce sector had begun to gain traction.

In contrast, the advent of the COVID-19 pandemic triggered a profound transformation in India's adult diaper market. The pandemic's emphasis on personal hygiene and healthcare led to a substantial surge in demand for adult diapers. This heightened demand wasn't confined solely to the elderly but extended to individuals recovering from COVID-19, grappling with post-recovery incontinence. E-commerce platforms were pivotal in delivering a convenient and contactless shopping experience, prompting their rapid adoption of adult diaper purchases. As awareness of incontinence management spread, the market witnessed remarkable expansion, propelling adult diapers into the mainstream and making them accessible to a broader demographic.

Key Player Landscape and Outlook

The landscape of India's adult diaper market is evolving with a focus on innovation, accessibility, and heightened competition among key players. Established manufacturers like Kimberly-Clark and Nobel Hygiene have actively expanded their product offerings and distribution networks. They invest in research and development to create advanced, more comfortable, eco-friendly adult diaper solutions. Additionally,

regional players and startups are entering the market, contributing to its diversification. The market outlook remains positive, driven by the aging population, increasing awareness of incontinence issues, and the lasting impact of the COVID-19 pandemic. Furthermore, the shift toward online retail channels, coupled with ongoing advertising and education campaigns, is expected to continue fueling the growth in this sector, making adult diapers increasingly accessible and acceptable, thus fostering a robust future for the India adult diaper market.

For instance, in 2022, Ascent Meditech's flagship brand, Flamingo, expanded its personal protection product range by introducing adult diapers. With a history spanning over three decades, Ascent Meditech anticipates an 8-10 percent increase in its overall revenue due to the recent addition of Flamingo's adult diapers.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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