

# **Japan Adult Diapers 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**

Japan adult diapers market size was valued at USD 2.51 billion in FY2023, which is expected to reach USD 4.1 billion in FY2031, with a CAGR of 6.3% for the forecast period between, FY2024 and FY2031. The Japan adult diapers market's substantial growth reflects demographic, healthcare, and consumer trends. Japan's unique demographic landscape, with an increasingly elderly population and a shrinking birth rate, has set the stage for the market's remarkable expansion. As the proportion of elderly citizens continues to rise, so does the demand for adult diapers, primarily designed to cater to the specific needs of this demographic group. The prevalence of conditions such as incontinence and mobility impairments among the elderly has further heightened the market's demand, making adult diapers an essential part of elderly care.

Japan's advanced healthcare infrastructure has played a pivotal role in propelling market growth. Access to innovative products, including highly absorbent diapers with odor-control features, has resonated with a broad consumer base seeking effective and dignified solutions for incontinence issues. This emphasis on innovation aligns with Japan's reputation for technological excellence. Moreover, the market's relentless pursuit of product design that prioritizes comfort and convenience has fueled its expansion. Manufacturers have been keen on developing diapers that address functional requirements and enhance users' overall quality of life. In sum, Japan's adult diapers market's growth trajectory is a testament to its ability to adapt and thrive in response to its aging population's evolving needs and preferences.

### Rising Demand for Comfortable and Convenient Adult Diapers

The Japan adult diapers market has experienced a notable surge in demand for comfortable and convenient adult diapers. This trend is primarily driven by a growing awareness of the importance of elderly care and an emphasis on maintaining the quality of life for seniors and individuals with mobility challenges. Consumers are increasingly seeking adult diapers that provide effective protection and prioritize comfort and ease of use. Manufacturers have responded by introducing innovative designs that offer a more discreet and comfortable fit, allowing users to go about their daily activities confidently. Features such as improved absorbency and skin-friendly materials have become key selling points, resonating with a consumer base that values convenience and dignity. As Japan's aging population expands, the demand for adult diapers that meet these criteria will remain a prominent driver of market growth.

### Technical Development and Innovations

The Japan adult diapers market has witnessed remarkable technical developments and innovations in recent years. Manufacturers have continuously invested in research and development to enhance product performance and user comfort. Notable innovations include advanced absorbent materials with higher moisture retention levels and odor control, ensuring extended wear time and improved hygiene. Thinner and more discreet designs have also gained popularity, allowing users to maintain their dignity while benefiting from superior protection. Environmentally conscious solutions, such as biodegradable materials and eco-friendly production processes, have emerged in response to sustainability concerns.

Furthermore, integrating smart technologies, including moisture sensors and mobile apps for caregivers, has brought convenience and efficiency to managing incontinence

issues. These technological advancements cater to the evolving needs of Japan's aging population and position the market for sustained growth and competitiveness. Zuiko's SFD-600 is an innovative solution. It processes sealed bags of used diapers, automatically shredding, fermenting, drying, and sterilizing them to create a high-quality material suitable for palletization. These pellets can be used as biomass boilers' fuel source, generating heat and energy efficiently.

### Increasing Awareness about Incontinence and Aging Population

The Japan adult diapers market is witnessing a significant upswing due to the increasing awareness about incontinence issues and the nation's rapidly aging population. With Japan's demographic landscape characterized by a substantial proportion of elderly citizens, there is a heightened consciousness about the challenges associated with aging, including incontinence. As the elderly population grows, so does the prevalence of incontinence-related conditions, necessitating adult diapers as a practical solution for managing these issues with dignity.

The aging demographic and a declining birth rate ensure a sustained demand for adult diapers, making them a pivotal element for elderly care. This dual impact of rising awareness and demographic shifts underscores the Japan adult diapers market's resilience and potential for ongoing growth. For example, Japan is experiencing rapid aging, making it the world's most 'super-aged' society, with a remarkable 28.7% of its population aged 65 or older, with women comprising the majority. The nation is home to an astounding 80,000 centenarians. Projections indicate that by 2036, individuals aged 65 and above will constitute a third of the total population. This demographic shift is associated with an increased likelihood of incontinence-related issues among the aging population.

### Impact of COVID-19

The pandemic had a notable impact on the Japan adult diapers market. Initially, there was a surge in demand for adult diapers as individuals sought to stock up on essential supplies amidst lockdowns and concerns about public restroom access. Elderly and vulnerable populations, who are the primary consumers of adult diapers, increased their purchases due to fear of supply chain disruptions. However, as the pandemic prolonged, economic uncertainties led consumers to cut back on non-essential spending, impacting the market's growth. Furthermore, the pandemic exposed vulnerabilities in caregiving systems, highlighting the need for better incontinence care solutions. In response, manufacturers increased their focus on product innovation,

including more comfortable and advanced adult diaper technologies to address the evolving needs of consumers in a post-pandemic landscape.

### Key Player Landscape and Outlook

Japan adult diapers market featured a competitive landscape with key players vying for market share. Domestic companies like Unicharm Corporation, Daio Paper Corporation, and Kao Corporation maintained a strong presence, leveraging brand recognition and product quality. International players like Kimberly-Clark, Ontex Group, etc. compete, often focusing on innovation and premium offerings. The market was characterized by continuous product development, including thinner and more discreet designs, eco-friendly options, and advanced absorption technologies. Additionally, the aging population in Japan and the increasing awareness of incontinence issues continued to drive the demand. The market outlook appeared positive, with opportunities for growth through expanding product lines and catering to evolving consumer preferences for comfort and convenience.

For instance, starting January 2021, Kao Corporation and Kyoto University have jointly initiated a verification test for a Used Disposable Diaper Carbonization Recycling System in collaboration with Saito City, Ehime Prefecture, Japan. The technology development for transforming used diapers into carbon material is anticipated to reach fruition by 2023, to commence public deployment in 2025 or later.

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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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