

North America Adult Diaper Market Forecast to 2030 - COVID-19 Impact and Regional Analysis by Product Type (Pull-up Diapers, Tape on Diapers, Pad Style, and Others), Category (Men, Women, and Unisex), and End-User (Residential, Hospitals and Clinics, and Others)

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Abstracts

The North America adult diaper market is expected to grow from US\$ 4.51 billion in 2022 to US\$ 6.52 billion by 2030; it is expected to record a CAGR of 4.9% from 2022 to 2030.

The growing geriatric population in North America is a significant driver for the adult diaper market. In addition to this, with sedentary lifestyles, high per capita income, and increasing consumption of frozen, packaged, and fast food, most of the population in the region suffer from obesity, which, in turn, is leading to a high rate of adult incontinence. As individuals age, the likelihood of developing incontinence increases. Incontinence refers to the loss of bladder or bowel control, leading to involuntary leakage of urine or feces. It is a common issue among older adults, primarily caused by age-related factors, such as weakened pelvic muscles and specific health conditions. The rising aging population directly correlates with a growing prevalence of incontinence, thereby driving demand for adult diapers as an effective solution. The rising aging population directly correlates with an increased prevalence of incontinence, thereby driving demand for adult diapers as an effective solution.

Additionally, many older adults require long-term care in their own homes, assisted living facilities, or nursing homes. In these settings, adult diapers are crucial in managing incontinence and maintaining hygiene and comfort for older people. The

aging population's need for long-term care services has created a significant demand for adult diapers in North America, as they are an essential part of the care routine for older individuals with incontinence. Thus, the growth in aging population would create lucrative opportunities for North America adult diaper market growth in the coming years.

The North America adult diaper market is segmented on the basis of product type, category, and end-user. Based on category, the market is segmented into men, women, and unisex. The unisex segment held the largest share of the market in 2022, and is expected to dominate the market in the forecast period. Unisex adult diapers, also known as gender-neutral adult diapers, are designed to be worn by individuals of any gender who experience bladder or bowel incontinence. These diapers are typically designed with a unisex fit. They come in various sizes with varying absorbency levels. Additionally, some varieties have odor control technology to minimize unpleasant smells.

Based on country, the North America adult diaper market is segmented into the US, Canada, and Mexico. In 2022, the US accounted for the largest share of the North America adult diaper market. The COVID-19 pandemic led to unprecedented challenges for many sectors, such as consumer goods. Lockdowns, border restrictions, travel bans, the shutdown of manufacturing units, and other safety protocols under the guidelines of governments of different nations adversely impacted the operations of manufacturing companies. Moreover, the supply chains were disrupted during 2019, 2020, and 2021 due to nationwide lockdowns and border restrictions, hampered the production and distribution of various products. The surging elderly population primarily drove the adult diaper market along with increasing cases of incontinence before the onset of the COVID-19 pandemic.

However, the consumer goods industry experienced adverse impacts of the pandemic during the first quarter of 2020. Various industries had to slow down their operations due to disruptions in value chains caused by the shutdown of national and international boundaries. The pandemic led to social distancing restrictions and severe economic impact, hampered adult diaper manufacturing and distribution. The COVID-19 pandemic also led to an economic recession in the initial months of 2020, which created financial difficulties for low-income and mid-income consumers. As a result, people only purchased primary essential products such as groceries and critical medical products, which reduced the sales of adult diapers.

Nippon Paper Industries Co Ltd; Drylock Technologies NV; Ontex BV; Health Care

Products Inc; First Quality Enterprises Inc; Kimberly-Clark Corp; Principle Business Enterprises Inc; Essity AB; Abena AS; and Paul Hartmann AG are a few of the major players operating in the North America adult diaper market. These companies have their presence in both developed and developing countries, which provides lucrative opportunities for their growth, and further drives the North America adult diaper market growth.

The overall North America adult diaper market has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights into the topic. The participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers—along with external consultants such as valuation experts, research analysts, and key opinion leaders—specializing in the North America adult diaper market.

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