

World Market for Retail Disposable Hygiene

May 2022

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INTRODUCTION

Scope

Five trends shaping retail disposable hygiene

STATE OF THE INDUSTRY

Demand tracks accelerated longer-term growth following a transient slowdown in 2021

Retail adult incontinence leads long-term growth across regions

Retail adult incontinence to see fastest growth ahead

Recovering consumer finance supports retail adult incontinence's growth rebound

Developing world drives an increased share of retail adult incontinence consumption...

...due in large part to significant per capita potential in Asia Pacific

Diverging format prevalence by region reflects availability and awareness gaps

Growing demand for mobility incentivises pull-on adoption

Asia Pacific's strength presages expected strong global forecast growth

Slim format drives sanitary protection forecast growth

STATE OF THE INDUSTRY

Contraceptive prevalence could further dampen sanitary protection demand

Reuseables put a further dent in disposable sanitary protection and incontinence demand

Multitaskers target a less-is-more approach to below-the-waist hygiene for adults

Nappies/diapers/pants projects strongest gains in developing APAC and MEA markets...

...driven in large part by healthy per capita penetration momentum and birth outlook

Diverging format preference reflects lifestyle shifts, while price remains a hurdle

Efficacy-value hybridity remains top of mind

Evolving cloth nappy/diaper niche boasts growing variety

Personal wipes leads future growth following transitory slowdown, driven by Asia Pacific

E-commerce growth tapers but still up considerably from pre-pandemic

Asia drives e-commerce expansion

LEADING COMPANIES AND BRANDS

Market leaders cede shares to local players

Rise of upstarts further drives share erosion on top

Expected persisting supply chain challenges reinforce localisation move

Localisation as a strategy to gain consumer proximity at lower risks and costs

M&A activity will support localisation: Essity

Narrowing quality gap plus value sustain private label's foothold in well situated markets...

...while elsewhere, quality and marketing improvements help unlock long-term growth

TOP FIVE TRENDS SHAPING THE INDUSTRY

Five trends shaping retail disposable hygiene

Consumer shifts and tech enhancements bolster expectations for hygiene stewardship

Consumers adopt a proactive, conscientious and individualistic approach to consumption

Industry response nods to consumer priorities

Clean, health claims remain most popular, though categories show varied priorities

Ingredient-led narratives emphasise health, emotional and eco wellbeing: biom

Holistic and targeted need state segmentation: LOLA

No-frills approach that instils reliability and customisability in existing brand DNA: Lillydoo

Smart tech equips personalisation with higher precision: Henkel

Endorsing social purpose, inclusivity and efficacy: Cora

Ingredient, packaging, manufacturing and waste are key areas for sustainability investments

Holistic hygiene approach to sustainability

Post-life upcycling remains a collaborative endeavour: Softex Indonesia-Octopus partnership

MARKET SNAPSHOTS

Global snapshot of Retail Hygiene

Regional snapshot: Asia Pacific

Regional snapshot: North America

Regional snapshot: Latin America

Regional snapshot: Western Europe

Regional snapshot: Middle East and Africa

Regional snapshot: Eastern Europe

Regional snapshot: Australasia

APPENDIX

Euromonitor International's survey insights

Euromonitor International's voice of the consumer insights

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