



World Market for Disposable Hygiene

March 2023

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Scope

Five trends shaping retail disposable hygiene

STATE OF THE INDUSTRY

Inflation stalls demand recovery while accelerating nominal value growth in 2022

APAC drives long-term global gain despite COVID and demographic challenges in key markets

Unfulfilled per capita potential and menstruation population support developing potential

India is on track to replace the US as the second-largest market in menstrual care

Slim towel drives sanitary protection growth, powered mainly by Asia Pacific demand

Retail adult incontinence leads category growth across regions

State of adult incontinence in context: Retail segment to lead growth and gain further share

Retail incontinence performance can be further shaped by other paths to purchase

Retail adult incontinence currently remains a developed market-dominated category

Per capita gap and ageing population bode well for long-term growth in developing APAC

Products targeting moderate/heavy incontinence are expected to slightly outperform

Desire for mobility, comfort and dignity drives pull-up and adjustable brief usage

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

...which drive most new births with ample unmet per capita potential

Indonesia leads bulk of diaper gains due to birth and income growth and lifestyle shifts

Disposable pants projects faster growth led by APAC demand

Washable and hybrid formats further penetrate as greener complements

New washable launches shed light on inclusivity, sustainability and dignity

Baby wipes drives bulk of growth in disposable wipes

Relaxing cleaning intensity drives demand normalisation in wipes

Major increase in retail prices of disposable hygiene goods observed from Q1 2022

Record revenue growth across retail hygiene in 2022, as value sales surge in nominal terms

Bargain and quality balancing helps navigate sweet spot in consumer spending

E-commerce tracks tapered yet continued growth led by APAC despite grocers' dominance

Differences in shopping motivations lead to phy-gital blend

LEADING COMPANIES AND BRANDS

Market leaders cede shares to rising local players

Procter & Gamble sheds share due to intensifying competition from upstarts

Evolving innovations and localisation drive Kimberly-Clark's share growth

Narrowing quality gap and value sustain private label's foothold in Western Europe

TOP FIVE TRENDS SHAPING THE INDUSTRY

Five trends shaping retail disposable hygiene

Value for money is an attribute to stay, while ethical positioning gains long-term significance

Clean and green features recognised as top targets for innovation

Rising mobility and health expectation underpins skin- and comfort-centric releases

Local lifestyles and need gaps drive further tailoring of ingredients and formats

Digital instruments bring more precise and simplified hygiene experience

Sustainability actions extend from sourcing to end-of-life management

From down-the-waist cycle support to holistic gynae and life-stage care

MARKET SNAPSHOTS

Global snapshot of disposable 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

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