

# Adult Incontinence Products Market Study

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Straits Research Pvt Ltd is a leading market research firm offering comprehensive insights on market demand, trends, growth prospects and regional analysis. With over 35 years of combined experience, we provide premium qualitative insights on consumer preferences, regulatory landscape, and technological advancements along with quantitative insights on industry market size, global economic scenario and revenue opportunities. These reports are backed by high-quality data sourced from primary sources and large secondary databases. With analyst perspectives and insights included in every report, Straits Research delivers comprehensive market intelligence and detailed analysis to help clients make informed decisions.

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Procter & Gamble Co

Hollister Incorporated

Kimberly-Clark Corporation

Unicharm Corporation

First Quality Consumer Products LLC

Abena Holding A/S

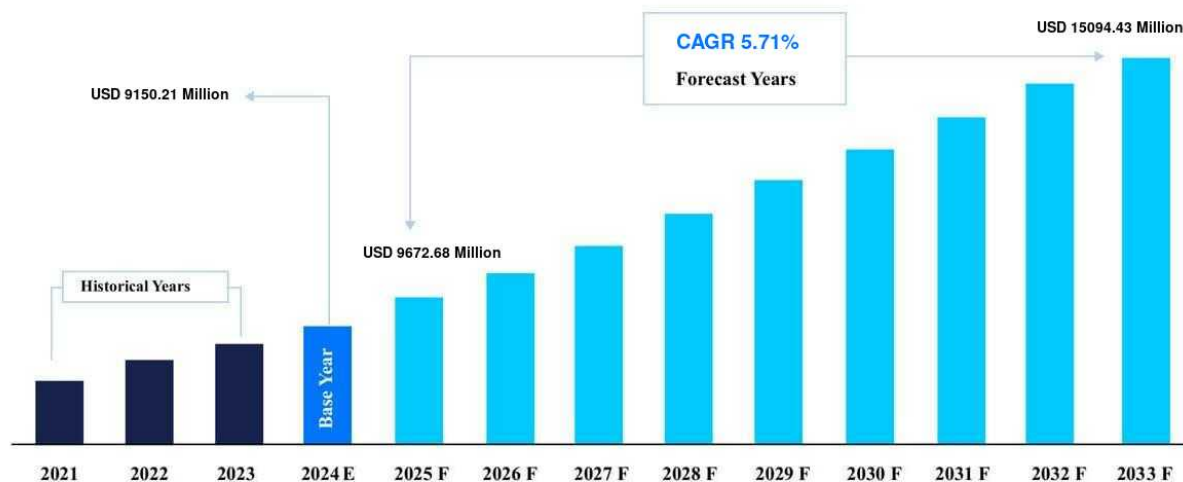
Essity

McKesson Corporation

Hayat Kimya

Kao Corporation

**Note:** More company profiles available on full reports.



Source: Straits Research

## Emerging Countries

United States

Germany

Japan

## Emerging Companies

Procter & Gamble Co

Hollister Incorporated

Kimberly-Clark Corporation

## Top 5 Company Market Share



**Total**  
**75%**

Top 5 company market share

# Market Trends

## Growth Trends

- Increasing demand for disposable incontinence products
- Technological advancements in adult incontinence products
- Raising awareness about personal hygiene and health
- Increasing consumer preference for high-absorbency adult diapers
- Growth of e-commerce in the healthcare sector
- Increase in the development and introduction of biodegradable and organic adult incontinence products
- Rising demand for gender-specific products

## Factors considered while calculating market size and share

- Population demographics, specifically the aging population
- Prevalence and incidence of incontinence
- Consumer awareness and acceptance of adult incontinence products
- Availability and accessibility of different types of incontinence products
- Price of incontinence products
- Market saturation, competition, and new entrants
- Market regulations and government policies

## Key Market Indicators

- Sales volume and value of various incontinence products
- Population aged 65 and above
- Incontinence prevalence rate
- Number of caregivers for the elderly
- Healthcare expenditure
- Insurance coverage for adult incontinence products
- Lifestyle changes and stress levels in the population

## High cost of adult incontinence products

The high cost of adult incontinence products remains a significant barrier, particularly in developing regions where disposable incomes are lower. Premium products, known for their superior comfort, absorption, and skin protection, are often priced beyond the reach of cost-sensitive consumers. Moreover, the recurring nature of these purchases—due to the consumable nature of incontinence products—adds a continuous financial burden. For many users, the need for frequent replacements exacerbates the challenge. In many countries, government subsidies and reimbursement policies for incontinence management are limited, further restricting affordability for a large portion of the population.



# Market Trends

## Increasing geriatric population globally

The growing elderly population is a key driver of the adult incontinence products market. As people age, they become more susceptible to various health conditions, including chronic obstructive pulmonary disease, diabetes, and urinary incontinence. Older adults often face multiple health issues simultaneously, which increases their need for incontinence products.

- According to the World Health Organization (WHO), the proportion of the global population over 60 years old is projected to nearly double from 12% in 2015 to 22% by 2050. This demographic shift will significantly boost the demand for adult incontinence products worldwide.
- Likewise, the International Institute on Ageing reports that by 2050, six countries—China, India, the United States, Japan, Brazil, and Indonesia—are expected to have over 10 million people aged 80 or older. These six countries alone will account for 57% of the global population aged 80 and above, further intensifying the demand for incontinence products.

## Increasing product innovation & technology

Rising competition in the adult incontinence product market is driving significant innovation and technological advancements. Companies are increasingly focusing on incorporating new technologies to improve product performance and offer better solutions for urinary incontinence. This push for innovation is also driven by growing concerns over sustainability, as disposable incontinence products see increased demand due to their compatibility with standard waste management systems.

- One example of innovation is Essity's launch of Tena Sensitive Care Pads in 2022. These pads are enriched with Essity's SkinComfort Formula, specifically designed to address skin irritation—a common issue, with 77% of women with bladder weakness reporting discomfort. The product features a skin-friendly layer combined with soft, 100% breathable materials, offering better protection and enhanced comfort for intimate skin.

# Market Segments

## By Product Type

Diapers/Pads hold 55-60% of the market share. This segment is the largest, driven by the demand for absorbent, discreet, and comfortable solutions for people with severe incontinence.



55-60%

Diapers/Pads

## By End-User

Female users dominate the market, primarily due to the higher prevalence of urinary incontinence among women, particularly with aging and post-pregnancy conditions.



XX%

Female

## By Distribution Channel

The Supermarket/Hypermarket captures the market, as these stores are favored for their convenience, product availability, and diverse selection.



XX%

Supermarket/Hypermarket

# Regional Overview

## North America

North America, with the U.S. as the largest consumer, accounts for 35-40% of the global adult incontinence market. This demand is driven by the aging population and growing awareness of incontinence solutions.



**35-40%**

United States Market Share

## Europe

Europe, with Germany leading, holds 8-10% of the market, driven by its strong healthcare system and large elderly population. Increased awareness and growing demand for high-quality incontinence products are key factors fueling this growth



**8-10%**

Germany Market Share

## APAC

The APAC region sees significant demand for adult incontinence products, with Japan being the largest consumer. This is largely due to the country's rapidly aging population and advanced healthcare infrastructure.



**XX%**

Japan Market Share

# Regional Overview

## Middle East and Africa

The MEA region experiences a growing demand for incontinence products, with South Africa leading in consumption due to increased healthcare awareness and a rising elderly population.



XX%

South Africa Market Share

## LATAM

LATAM sees a growing demand for incontinence products, with Brazil being the leading consumer. This growth is driven by rising awareness, particularly among older adults.



XX%

Brazil Market Share



# Company Profiles

Companies	Websites	Headquarters	Establisheds	Key Executives	Revenues
Procter & Gamble Co	<a href="http://www.pg.com/">http://www.pg.com/</a>	Cincinnati, Ohio, USA	1837	Jon Moeller (CEO)	\$80 billion
Hollister Incorporated	<a href="http://www.hollister.com/">http://www.hollister.com/</a>	Libertyville, Illinois, USA	1921	John J. McNerney (CEO)	\$2.2 billion
Kimberly-Clark Corporation	<a href="http://www.kimberly-clark.com/">http://www.kimberly-clark.com/</a>	Irving, Texas, USA	1872	Michael D. Hsu (CEO)	\$21 billion
Unicharm Corporation	<a href="http://www.unicharm.co.jp/">http://www.unicharm.co.jp/</a>	Tokyo, Japan	1961	Shoji Tanaka (President)	\$5 billion
First Quality Consumer Products LLC	<a href="http://www.firstquality.com/">http://www.firstquality.com/</a>	Great Neck, New York, USA	1989	Robert G. Johnson (CEO)	\$1.5 billion

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