

India Diapers Market Growth Analysis - Forecast Trends and Outlook (2025-2034)

Market Report | 2025-08-11 | 119 pages | EMR Inc.

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Report description:

The India diaper market reached a value of USD 1731.04 Million in 2024. The market is further estimated to grow at a CAGR of 15.30% during 2025-2034 to reach a value of USD 7187.87 Million by 2034.

India Diaper Market Growth

It is estimated that by 2050, India will have the third-largest elderly population. The rising media coverage and public health initiatives for incontinence management are breaking taboos, increasing the adoption of diapers among adults and babies. There is a growing adoption of dry pants among adults, which are easier to wear and more comfortable to manage.

In April 2023, India overtook China as the largest populated country across the globe. The country's population is expected to grow, indicating a steady influx of infants and toddlers requiring diapers.

Industry Outlook

Changing Population Demographics and Expanding E-commerce Sales to Support Diaper Sales in India

The total fertility rates (TFR) for India from 2010-2100 indicate significant demographic shifts and trends. According to data from the World Population Prospects by the UN's Department of Economic and Social Affairs Population Division, India had a fertility rate of 2.44 in 2010-2015, slightly below the global average of 2.52. By 2025-2030, India's TFR is expected to decline to 2.10, aligning closely with the replacement level fertility rate of 2.1, which is the rate required to keep the population stable. By 2095-2100, India's TFR is projected to reach 1.78, below the replacement level, indicating a future trend towards smaller family sizes. This projected decline reflects improvements in education, economic development, and increased access to family planning services.

According to data from the Ministry of Statistics and Programme Implementation (MOSPI), the elderly population (those aged 60

and above) has been growing at a much faster rate than the general population over the past several decades. The elderly population is expected to grow by a remarkable 40.5%, compared to just 8.4% for the general population during 2021-2031. This projection underscores the accelerating pace of population aging in India. Elderly individuals often experience restrictions in activities of daily living (ADL), which significantly impacts their quality of life and independence. These restrictions likely necessitate increased care and support services, highlighting the need for adult diapers. The anticipated rise in demand for adult diapers is expected to contribute to the overall India diaper market value.

As per Periodic Labour Force Survey (PLFS) 2019-20, in rural areas, 6.3% of males and 4.0% of females were employed as legislators, senior officials, and managers, while in urban areas, 17.8% of males and 11.7% of females held similar positions. For professionals, 2.0% of rural males and 1.7% of rural females were employed in this category, compared to 8.8% of urban males and 13.7% of urban females. In the category of technicians and associate professionals, rural employment included 2.1% of males and 2.9% of females, while in urban areas, 6.1% of males and 11.7% of females held these roles.

According to India Brand Equity Foundation, the rapid rise in e-commerce Gross Merchandise Value (GMV) in India from FY2019 to FY2023 reflects a significant transformation in consumer behavior and the retail landscape. In FY2019, the GMV stood at USD 22 billion. This figure increased to USD25 billion in FY2020, representing a year-over-year (YoY) growth rate of 13.6%. The subsequent fiscal years saw substantial accelerations in growth, particularly spurred by the COVID-19 pandemic, which significantly boosted online shopping as physical stores faced restrictions and consumers turned to digital platforms for their purchasing needs. The growing use of online platforms to purchase personal care and hygiene products, including diapers, is expected to aid the India diaper market expansion.

By FY2021, the GMV had escalated to USD36 billion, marking a YoY growth rate of 44%. In FY2022, the GMV further climbed to USD 49 billion, maintaining a strong YoY growth rate of 36.1%. The most remarkable growth occurred in FY2023, where the GMV soared to USD 60 billion, reflecting a YoY growth rate of 22.5%. Despite the slight deceleration in the growth rate compared to the previous years, the absolute increase in GMV indicates the consolidation of e-commerce as a dominant force in the retail sector. Factors contributing to this growth include the expansion of internet and smartphone penetration, enhanced logistics and delivery networks, sustained shift towards online shopping, improved digital infrastructure, and increased consumer confidence in e-commerce platforms. The continued growth in e-commerce enables diaper manufacturers to expand their market reach, improving diaper market opportunities in India.

Figure: Population of India (2020 - 2023)

Recent Developments and Key Trends

Increasing number of working parents; rising adoption of eco-friendly diapers; rising awareness of health and hygiene; and expansion of e-commerce channels are boosting the India diaper market value.

May 10, 2023

Friends, the flagship brand of one of the top Indian diaper companies Nobel Hygiene Pvt Ltd, announced the launch of India's first 'slim' disposable absorbent underpants - Friends UltraThinz. The product is designed for younger sufferers of incontinence.

Mar 16, 2022

Nobel Hygiene launched its new flagship product - Snuggy Gold Pant-Style Diapers.

Jan 16, 2024

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Pampers, the brand of Proctor and Gamble launched a new and improved range of Premium Care Diapers for babies. The diaper provides 360-degree cottony softness and has an inbuilt anti-rash blanket and lotion with aloe vera.

Feb 16, 2023

Kimberly-Clark announced the relaunch of its premium diaper range, Huggies Nature Care for Indian consumers.

Rising number of working parents contributing to the growth of the India diaper industry

With the increasing number of women joining the workforce, adoption of diapers has become essential. Working parents are choosing diapers as a practical solution, in order to provide comfort and hygiene for the child, which is expected to support the India diaper demand growth.

Growing inclination towards eco-friendly diapers

The rising environmental concerns and the focus on reducing waste generation are boosting the adoption of eco-friendly diapers. Introduction of diapers made with sustainable materials will likely increase their use by environmentally conscious parents, increasing the India diaper market revenue.

Increasing awareness of hygiene

There is a growing awareness regarding the importance of maintaining proper hygiene, particularly for infants and toddlers, which is leading to the India diaper market development. The improved convenience and health benefits offered by diapers are driving its adoption among new parents.

Growing e-commerce channels

E-commerce platforms are gaining traction across India, with the increased digitisation efforts. Online platforms provide a wide variety of options to choose from and enhance convenience with the added benefit of home delivery.

India Diaper Market Trends

The diaper market in India has been aided by the growing participation of women in the workforce, the rising awareness regarding the benefits of diapers, the expansion of distribution channels, and the increasing availability of diapers in diverse sizes and designs.

With the rising demand for convenient baby care products, especially among young parents, the demand for diapers as a substitute for traditional open and tie diapering systems is surging.

As the penetration of diapers is low in low-income households, leading companies are introducing pack sizes and affordable diapers to cater to evolving consumer demands. Moreover, the growing demand for diapers in the rural areas owing to the rising focus on infant care is expected to drive diaper sales in India.

What Factors are Driving the India Diaper Market Growth?

- The country has one of the largest and fastest-growing populations in the world, with a high birth rate, creating a large and

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sustained demand for diapers in India.

- Rapid urbanisation and the increasing number of working parents contribute to the growing demand for disposable diapers.
- Established brands like Pampers, Huggies, and MamyPoko, have built strong brand loyalty and trust among consumers.
- Shifting consumer preference from traditional cloth diapers to more convenient disposable options are increasing the India diaper market revenue.
- There is growing awareness about the importance of health and hygiene among the elderly and their caregivers, driving the acceptance and use of adult diapers in India.

Key Challenges Impacting the Growth of the India Diaper Market

- The relatively high cost of disposable diapers compared to traditional cloth diapers can limit their penetration in rural and lower-income segments.
- Disposable diapers contribute significantly to environmental pollution due to their non-biodegradable nature.
- The India diaper market is heavily dependent on imports for raw materials.
- In rural areas, awareness about the benefits and availability of disposable diapers remains low.
- Economic downturns can affect consumer spending power, leading to reduced demand for non-essential goods like disposable diapers.

What are the Opportunities in the India Diaper Market Landscape?

- With targeted marketing and education campaigns, there is a significant opportunity to expand the diaper market in rural areas where penetration is currently low.
- Development of eco-friendly and biodegradable diapers that can mitigate environmental concerns will likely positively impact the India diaper demand forecast.
- The rapid growth of e-commerce platforms in India provides an opportunity to reach a wider audience.

India Diaper Industry Segmentations

?India Diapers Market Report and Forecast 2025-2034? offers a detailed analysis of the market based on the following segments:

Market Breakup by Product Type

- Baby Diaper
- ??- Breakup by Type Disposable Diapers Training Diapers Cloth Diapers Swim Pants Biodegradable Diapers
- ??- Breakup by Size Small and Extra Small Medium Large Extra Large
- Adult Diaper

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??- Breakup by Type Disposable Diapers Cloth Diapers Biodegradable Diapers

??- Breakup by Size Small Medium Large Extra Large

Market Breakup by Distribution Channel

- Supermarkets and Hypermarkets
- Convenience Stores
- Pharmacies
- Online
- Others

Market Breakup by Region

- North Region
- East and Central Region
- West Region
- South Region

India Diaper Market Share

Based on product type, baby diapers are widely used by new parents, significantly contributing to the Indian diaper industry growth

Various companies are offering extensive product variants with features, such as dryness, softness, and comfort. These companies are making huge investments in product innovations to draw engagement from recent-mothers and to-be-mothers, leading to the growing demand for baby diapers.

According to the India diaper industry analysis, the demand for adult diapers is expected to increase in the coming years. This is likely to be supported by the growing incidences of piles, prostate disorders, incontinence, diabetes, and urology problems among the geriatric population, necessitating the use of personal care products.

Based on distribution channel, pharmacies account for a significant share of the India diaper market

The proximity of pharmacies, along with the quality customer service and personalised advice provided by pharmacists regarding the usage of the product, are some of the factors that are propelling the segment growth.

Supermarkets and hypermarkets offer extensive availability of baby products, including diapers, from several brands. As various supermarkets and hypermarkets are looking to expand their presence in the country, especially in tier-II and tier-III cities, the sales of diapers from supermarkets and hypermarkets are likely to grow.

The market is expected to be fuelled by the growing penetration of various direct-to-consumer (D2C) brands of diapers in India which are offering their products via online channels.

India Diaper Market Competitive Landscape

The market is highly competitive, with leading players increasingly investing in product marketing to increase their customer

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base.

The Procter & Gamble Company

Procter & Gamble is a multinational company headquartered in the US. The company offers its products through renowned brands such as Pampers, Ariel, Tide, Whisper, Gillette, among several others.

Kimberly-Clark India Pvt. Ltd

Kimberly-Clark, with global headquarters in the United States, offers several products through its business segments such as adult care, baby and child care, feminine care, family care and Kimberly Clark professional.

Unicharm Corporation

Established in 1961, Unicharm Corporation specializes in the sales of wellness care products, pet care products, feminine care products, baby and child care products, food-packaging materials, etc.

Nobel Hygiene Pvt. Ltd

Headquartered in India, the company provides hygiene products for adults under the brand name 'Friends' and a wide product range of baby care products under the brand name 'Teddy'.

Other notable players operating in the India diaper market are The Himalaya Drug Company, Abena International A/S, Swara Baby Products Pvt. Ltd., PAN Healthcare Pvt. Ltd, Millennium BabyCares Pvt Ltd, and R for Rabbit Baby Products Pvt. Ltd, among others.

Competitive Factors Influencing the Diaper Market Share in India

- Major brands like Pampers, Huggies, and MamyPoko have strong brand recognition and loyalty, which significantly influence consumer purchasing decisions.
- Building and maintaining consumer trust through consistent product quality and effective marketing campaigns support the India diaper market dynamics and trends.
- The quality of diapers, particularly in terms of absorbency, comfort, and skin-friendliness, is a key competitive factor.
- Introduction of new features like wetness indicators, breathable materials, and ergonomic designs can differentiate products.
- Competitive pricing strategies, including discounts and bulk purchase offers, are essential to attract cost-conscious consumers.
- An extensive and efficient distribution network that ensures widespread product availability in both urban and rural areas is critical.
- Effective marketing campaigns that target specific demographics, such as new parents, can significantly influence buying behavior.
- Educating consumers about the benefits of using disposable diapers over traditional cloth alternatives is expected to increase India diaper market opportunities.

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- Increasing consumer awareness about environmental issues drives demand for biodegradable and eco-friendly diapers.
- Leveraging advanced manufacturing technologies to improve production efficiency and reduce costs can provide a competitive edge.

Strategic Initiatives by India Diaper Market Key Players

Procter & Gamble (Pampers)

- Continuously introduces new products with advanced features such as superior absorbency, wetness indicators, and extra softness to enhance comfort for babies.
- Invests heavily in marketing campaigns, leveraging both traditional and digital media to reach a broad audience.

Kimberly-Clark (Huggies)

- Focuses on research and development to create products that offer improved fit, leak protection, and skin care.
- Commits to sustainability by using eco-friendly materials and reducing environmental impact through responsible manufacturing practices.
- Utilizes social media and digital platforms to engage with parents.

Unicharm (MamyPoko)

- Focuses on providing high-quality diapers at competitive prices to cater to a wide range of consumers, including budget-conscious families.
- Offers a diverse range of products, including pant-style diapers, which are popular for their convenience and ease of use.

Nobel Hygiene (Teddy)

- Emphasizes high-quality standards and uses advanced technology to produce comfortable and effective diapers.
- Engages in brand-building activities through advertising, social media campaigns, and collaborations.

Pigeon

- Develops diapers with unique features such as ultra-soft materials and superior absorbency to cater to the sensitive skin of babies.
- Provides a comprehensive range of baby care products, creating a one-stop solution for parents, which enhances brand loyalty.
- Strengthens its presence in both online and offline retail channels, making products easily accessible to consumers across India.

India Diaper Market Regional Analysis

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Diapers are being adopted by high-income families, office-goers, and young parents living in a nuclear ecosystem. Diapers are majorly being consumed by households in tier 1, tier 2 and tier 3 cities in India. Some of the strong markets for diapers include Lucknow, Kanpur, Patna, Ranchi, Indore and Ahmedabad.

Furthermore, increased penetration of e-commerce channels such as Amazon and Flipkart in urban areas is contributing to increased online sales of diapers in India.

More Insights On:

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