

Baby Diapers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 129 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Baby Diapers Market Analysis

The baby diapers market generated USD 55.09 billion in 2025 and is projected to reach USD 72.37 billion in 2030, advancing at a 5.61% CAGR. Growing awareness among parents regarding the critical importance of hygiene for their babies is driving increased investment in products that ensure cleanliness and comfort. This shift has accelerated the adoption of disposable diapers, which are perceived as more hygienic alternatives to cloth diapers. Key growth drivers now include premiumization, supportive government policies, and the expansion of direct-to-consumer (D2C) retail models, surpassing the influence of birth-rate trends. Industry players are leveraging innovations such as dual-core absorbency, plant-based materials, and subscription-based services to safeguard profit margins and enhance customer retention. Governments in Hong Kong and Singapore are fostering demand through initiatives like newborn bonuses and infant-care subsidies, while the United States is scaling up diaper distribution programs for low-income households. Additionally, advancements in raw materials, particularly biodegradable super absorbents, are transforming sustainability into a strategic revenue opportunity rather than a compliance expense.

Global Baby Diapers Market Trends and Insights

Surge in birth rates fuels demand for baby diapers

Rising birth rates directly correlate with an increase in the number of potential diaper users, as diapers are a fundamental necessity for infants, typically from birth to the age of three years. This growth in the infant population naturally drives higher

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

diaper consumption. In developed markets, where birth rates have stabilized, demand has shown unexpected resilience, effectively mitigating the impact of demographic challenges. For instance, the United States recorded 3,622,673 births in 2024, reflecting a 1% increase compared to the previous year and marking a reversal of a prolonged decline in birth rates. Additionally, government initiatives, such as Hong Kong's USD 20,000 newborn bonus, highlight how fiscal policies can stimulate artificial demand surges, extending beyond organic population growth trends. Companies that strategically adapt their product portfolios, optimize sizing options, and intensify promotional efforts are well-positioned to capitalize on these shifts. In markets where even minor fluctuations in birth rates can significantly influence diaper consumption, such proactive measures can yield substantial competitive advantages.

Premiumization of baby diapers drives the market

Consumers are demonstrating an increasing willingness to pay premium prices for products that offer enhanced performance features, fundamentally altering market dynamics by shifting the focus from volume-driven growth to value-driven strategies. Procter and Gamble's baby care segment serves as a prime example, where a decline in sales volume was offset by revenue stability achieved through the strategic optimization of a premium product mix. This development highlights a critical trend in the market: the ability to capture value through premium offerings is becoming more important than simply driving unit sales. In developed markets, where higher disposable incomes prevail, parents are placing greater emphasis on product efficacy and safety, often prioritizing these attributes over cost considerations. This evolving consumer behavior enables manufacturers to mitigate the impact of rising raw material costs by leveraging pricing power rather than relying solely on volume expansion. Advanced innovations, such as dual-core absorbency technology and the use of organic materials, are commanding significant price premiums that far exceed traditional manufacturing cost differentials. This indicates a strong correlation between the speed of innovation and the potential for margin growth, emphasizing the importance of continuous product development in sustaining competitive advantage.

Stringent single-use plastic ban legislations

Regulatory frameworks targeting plastic waste impose compliance costs and necessitate product reformulations, thereby constraining traditional manufacturing methods. In 2024, the United Kingdom enacted a sweeping ban on plastic-laden wet wipes, granting manufacturers an 18-month window to pivot to plastic-free alternatives. The European Union's Packaging and Packaging Waste Regulation, set to take effect in February 2025, demands that by 2050, all packaging must meet heightened recycling standards and climate neutrality benchmarks. Such regulations compel manufacturers to pivot towards alternative materials and revamped production processes, often leading to heightened initial costs and squeezed profit margins. The Federal Trade Commission mandates scientific backing for claims related to degradability and compostability, curbing manufacturers' tendencies to make unfounded sustainability assertions. As companies navigate these evolving regulatory landscapes, the associated compliance costs and reformulation timelines induce a temporary disruption in the market.

Other drivers and restraints analyzed in the detailed report include:

Boom in D2C online-native brands supports market / Government subsidy programs for infant hygiene / Volatile SAP and pulp prices compressing margins /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Disposable diapers maintain commanding market leadership with 71% share in 2024. Urban parents, often pressed for time, prioritize convenience and hygiene, making disposable diapers their preferred choice over cloth ones. Modern parenting trends

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

lean towards time-saving solutions, and disposable diapers significantly cut down on laundry and associated hassles. Yet, biodegradable alternatives are on a rapid ascent, boasting an impressive 8.42% CAGR growth rate projected through 2030. This surge underscores a pivotal shift in consumer priorities, leaning heavily towards environmental sustainability. The widening growth gap highlights a dual trend: heightened parental awareness of environmental ramifications and technological advancements that bridge the performance divide between traditional and eco-friendly diaper options.

Cloth diapers maintain a niche position in the market, appealing to cost-conscious and environmentally aware consumers despite their higher maintenance requirements. The segment has benefited from innovations in fabric technology and enhanced washing machine efficiency, which have mitigated many of the traditional barriers to adoption. Additionally, the implementation of stringent plastic waste regulations, particularly in European markets where environmental policies are more rigorous, is creating favorable conditions for the increased adoption of non-disposable alternatives.

In 2024, pant/pull-up diapers account for 58.40% of the market share and are projected to grow at a 7.24% CAGR through 2030. This performance highlights increasing consumer demand for convenience and features that support child development. The dual leadership in market size and growth indicates a shift toward products designed to facilitate toilet training and improve mobility for active toddlers. This preference aligns with evolving parenting practices that prioritize fostering child independence and achieving developmental milestones over basic containment. Japan's cultural emphasis on early toilet training and child autonomy drives pull-up adoption rates above global averages, despite the country's declining birth rates.

Taped diapers continue to play a critical role in the newborn and early infant segment, where ease of application and secure fit are prioritized over mobility. This segment benefits from advancements in adhesive technology and leak protection, maintaining its competitive position despite a declining market share. Additionally, the manufacturing efficiency of taped designs supports cost optimization, appealing to price-sensitive consumers and institutional buyers such as childcare facilities. This segmentation reflects increasing consumer sophistication, with parents opting for products tailored to specific developmental stages rather than relying on a single solution throughout the diapering period.

The Baby Diapers Market Report is Segmented by Product Type (Cloth Diapers, Disposable Diapers, and More), Style (Taped Diapers, Pant/Pull-Up Diapers), Absorbency Technology (Standard SAP Core, and More), Material Type (Cotton, Blended Fabrics, and More), Distribution Channel (Supermarkets/Hypermarkets, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific accounts for a significant 39.50% market share in 2024, driven by its high population density and the growing purchasing power of the middle class. However, demographic challenges pose risks to sustained long-term growth. In China, the expansion of childcare institutions is driving institutional demand while complementing household consumption. Additionally, government support for childcare infrastructure underscores a strong commitment to fostering market growth.

North America, despite holding a smaller market share, is projected to achieve the highest regional growth at a 9.34% CAGR through 2030. This growth highlights a shift where purchasing power and premiumization trends are becoming more influential than demographic volume in driving market expansion. The region benefits from elevated disposable incomes, early adoption of premium products, and a well-established e-commerce ecosystem that supports direct-to-consumer strategies. Government initiatives, such as the U.S. diaper distribution pilot, reflect policy acknowledgment of diapers as essential goods, potentially expanding the market beyond private purchasing capacity.

Europe exhibits consistent market growth, supported by stringent environmental regulations that encourage innovation in sustainable product alternatives. This creates opportunities for premium positioning and technological advancements. Meanwhile,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

South America and the Middle East and Africa present emerging growth opportunities, driven by urbanization, improvements in healthcare, and increasing disposable incomes. However, infrastructure limitations and price sensitivity are likely to constrain the development of the premium segment in the short term.

List of Companies Covered in this Report:

Procter & Gamble Company / Kimberly-Clark Corporation / CHIAUS (Fujian) Industrial Development Co.,Ltd. / Kao Corporation / Unicharm Corporation / Ontex Group NV / Daio Paper Corporation / Hengan International Group / WEHOO Hygiene / Hello Bello / Babee Greens / Humble Group AB / The Honest Company / Thirsties Inc. / Nobel Hygiene Pvt. Ltd. / Mama Bamboo / Coterie Baby Inc. / Eco Baby Products Pty / DYPER Inc. / Fewer Better Things LLC /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Surge in birth rates fuels demand for baby diapers
 - 4.2.2 Premiumization of baby diapers drives the market
 - 4.2.3 Boom in D2C online-native brands supports market
 - 4.2.4 Government subsidy programs for infant hygiene
 - 4.2.5 Increasing awareness of infant hygiene drives market growth
 - 4.2.6 Technological advancements in diaper manufacturing enhance product appeal
- 4.3 Market Restraints
 - 4.3.1 Stringent single-use plastic ban legislations
 - 4.3.2 Volatile SAP and pulp prices compressing margins
 - 4.3.3 High competition among market players
 - 4.3.4 Limited awareness in emerging economies
- 4.4 Consumer Behavior Analysis
- 4.5 Regulatory Outlook
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers/Consumers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitute Products

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.7.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Product Type

5.1.1 Cloth Diapers

5.1.2 Disposable Diapers

5.1.3 Biodegradable/Eco-friendly Diapers

5.2 By Style

5.2.1 Taped Diapers

5.2.2 Pant/Pull-Up Diapers

5.3 By Absorbency Technology

5.3.1 Standard SAP Core

5.3.2 Dual-Core and Channel Technology

5.4 By Distribution Channel

5.4.1 Supermarkets/Hypermarkets

5.4.2 Convenience/Grocery Stores

5.4.3 Pharmacy/Drug Stores

5.4.4 Online Retail

5.4.5 Other Channels

5.5 By Material Type

5.5.1 Cotton

5.5.2 Bamboo and Plant-based

5.5.3 Blended Fabrics

5.6 By Geography

5.6.1 North America

5.6.1.1 United States

5.6.1.2 Canada

5.6.1.3 Mexico

5.6.1.4 Rest of North America

5.6.2 Europe

5.6.2.1 Germany

5.6.2.2 United Kingdom

5.6.2.3 Italy

5.6.2.4 France

5.6.2.5 Spain

5.6.2.6 Netherlands

5.6.2.7 Poland

5.6.2.8 Belgium

5.6.2.9 Sweden

5.6.2.10 Rest of Europe

5.6.3 Asia-Pacific

5.6.3.1 China

5.6.3.2 India

5.6.3.3 Japan

5.6.3.4 Australia

5.6.3.5 Indonesia

5.6.3.6 South Korea

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.6.3.7 Thailand
- 5.6.3.8 Singapore
- 5.6.3.9 Rest of Asia-Pacific
- 5.6.4 South America
 - 5.6.4.1 Brazil
 - 5.6.4.2 Argentina
 - 5.6.4.3 Colombia
 - 5.6.4.4 Chile
 - 5.6.4.5 Peru
 - 5.6.4.6 Rest of South America
- 5.6.5 Middle East and Africa
 - 5.6.5.1 South Africa
 - 5.6.5.2 Saudi Arabia
 - 5.6.5.3 United Arab Emirates
 - 5.6.5.4 Nigeria
 - 5.6.5.5 Egypt
 - 5.6.5.6 Morocco
 - 5.6.5.7 Turkey
 - 5.6.5.8 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
 - 6.4.1 Procter & Gamble Company
 - 6.4.2 Kimberly-Clark Corporation
 - 6.4.3 CHIAUS (Fujian) Industrial Development Co.,Ltd.
 - 6.4.4 Kao Corporation
 - 6.4.5 Unicharm Corporation
 - 6.4.6 Ontex Group NV
 - 6.4.7 Daio Paper Corporation
 - 6.4.8 Hengan International Group
 - 6.4.9 WEHOO Hygiene
 - 6.4.10 Hello Bello
 - 6.4.11 Babee Greens
 - 6.4.12 Humble Group AB
 - 6.4.13 The Honest Company
 - 6.4.14 Thirsties Inc.
 - 6.4.15 Nobel Hygiene Pvt. Ltd.
 - 6.4.16 Mama Bamboo
 - 6.4.17 Coterie Baby Inc.
 - 6.4.18 Eco Baby Products Pty
 - 6.4.19 DYPER Inc.
 - 6.4.20 Fewer Better Things LLC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Baby Diapers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 129 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-09"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com