

Adult Diaper Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Personal Care, Hygiene & Baby Care (Consumer Goods & Services)
> **Source:** https://www.mordorintelligence.com/industry-reports/adult-diaper-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 15.57 billion
Projected Forecast (2031)	USD 15.57 billion
Growth Rate (CAGR)	9.43 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

- [Major players in Adult Diaper industry](images/chart_2.png)
- [Adult Diaper Market Size](images/chart_3.png)
- [Adult Diaper Market Share by Product Type, 2025](images/chart_4.png)
- [Adult Diaper Market Share by Distribution Channel, 2025](images/chart_5.png)
- [Adult Diaper Market Growth Rate by Region](images/chart_6.png)
- [Adult Diaper Market Concentration](images/chart_7.png)
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- [ESOMAR](images/chart_17.png)
- [GPTW](images/chart_19.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2021 - 2031 |
Market Size (2026) | USD 15.57 Billion |
Market Size (2031) | USD 24.44 Billion |
Growth Rate (2026 - 2031) | 9.43 % |
Fastest Growing Market | Asia Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Adult Diaper Market Analysis by Mordor Intelligence The adult diaper market size in 2026 is estimated at USD 15.57 billion, growing from 2025 value of USD 14.23 billion with 2031 projections showing USD 24.44 billion, growing at 9.43% CAGR over 2026-2031. This growth is primarily attributed to an aging population, increased diagnosis rates driven by the growing focus on preventive healthcare, and advancements in product design, such as thinner cores and discreet pant-style options. Public health education and medical outreach initiatives are effectively reducing stigma and driving higher adoption rates. Product innovations, including odor control, breathable materials, and gender-specific designs, are enhancing user comfort and expanding market penetration. The online retail channel is experiencing the fastest growth, as consumers increasingly prefer private purchasing options due to stigma. The Asia-Pacific region, led by China's demographic expansion, is recording the highest growth rate, while North America remains the largest market, supported by advanced reimbursement policies and strong awareness programs. The competitive landscape is evolving, with manufacturers focusing on three key strategies, including premium product innovation, value-driven offerings, and sustainability-focused initiatives.

Key Report Takeaways

- * By product type, moderate/heavy diapers led with 66.15% of adult diaper market share in 2025, while light diapers are on track to expand at 9.58% CAGR through 2031.
- * By category, pads captured 56.55% revenue share in 2025; pant-style products are forecast to grow at 9.70% CAGR through 2031.
- * By gender, the female segment accounted for 60.62% of the adult diaper market size in 2025, and unisex designs are projected to advance at 9.92% CAGR through 2031.
- * By distribution channel, drug stores/pharmacies held 36.98% of the adult diaper market size in 2025, yet online retail is recording the fastest CAGR at 10.59% through 2031.
- * By region, North America contributed 29.78% revenue in 2025, and Asia-Pacific is forecast to log the strongest 10.31% CAGR through 2031.

Key Market Trends

Global Adult Diaper Market Trends and Insights Drivers Impact Analysis*

DRIVER	(~) % IMPACT ON CAGR FORECAST	GEOGRAPHIC RELEVANCE	IMPACT TIMELINE
Rising awareness of incontinence and elderly care	+2.1%	Global (stronger in Asia-Pacific)	Medium term (2-4 years)
Favorable Healthcare Initiatives by the government and associations	+1.8%	North America and Europe	Medium term (2-4 years)
Growing aging population drives the demand	+3.2%	Global (notably Japan, China, Europe)	Long term (≥ 4 years)
Product innovations in comfort, absorbency and discretion	+1.7%	Initial impact in North America and Europe	Short term (≤ 2 years)
Rising demand for home healthcare products	+0.6%	Global	Short term (≤ 2 years)
Increasing disposable income in emerging economies	+0.8%	Asia-Pacific	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The adult diaper market is moderately consolidated, with established players and emerging challengers competing intensely for market share. Leading companies such as Kimberly-Clark Corporation, Procter and Gamble Company, Unicharm Corporation, Kao Corporation, and Essity AB dominate the market by capitalizing on their expansive distribution networks and substantial investments in research and development. These strategic efforts enable them to sustain their leadership positions and drive innovation within the market.

The competitive dynamics of the market are undergoing significant transformation as manufacturers increasingly adopt three pivotal strategies to differentiate themselves. These include premium innovation, which prioritizes enhanced comfort and superior performance; value positioning, which focuses on delivering cost-effective solutions without compromising on essential functionality; and sustainability leadership, which emphasizes the development of environmentally friendly alternatives to conventional products. To remain competitive and achieve sustainable growth, companies must continuously innovate and align their offerings with the rapidly evolving preferences and demands of consumers.

Emerging start-ups are disrupting traditional market dynamics by leveraging direct-to-consumer business models and incorporating Internet of Things (IoT) technologies into their products. For instance, in 2024, DriQ Health introduced AI-enabled briefs that notify caregivers, addressing staffing shortages in long-term care facilities and enhancing operational efficiency. Additionally, material suppliers such as Imerys are embedding themselves deeper into the value chain by collaborating with brand research and development teams to co-engineer advanced breathable fillers. This approach not only strengthens their partnerships but also ensures their offerings extend beyond standard commodity supply, adding significant value to the overall product development process.

Adult Diaper Industry Leaders* Kimberly-Clark Corporation

* Unicharm Corporation

* Kao Corporation

* Essity AB

* Procter and Gamble Company

* *Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

The adult diaper market, for this methodology, covers disposable absorbent hygiene products designed for adults to manage urinary or fecal incontinence and related mobility needs, across retail and institutional buying.

Scope exclusions: This sizing does not count reusable cloth products, pediatric diapers, skin care creams, or unrelated continence devices such as catheters.

Segmentation Container

* By Product Type* Light Diaper

* Moderate/Heavy Adult Diaper

* By Category* Pad

* Pant-style (Pull-up)

* Others

* By Gender* Male

- * Female
- * Unisex
- * By Distribution Channel* Supermarkets/Hypermarket
- * Drug Stores/Pharmacies
- * Online Retail Stores
- * Others Distribution Channel
- * By Geography* North America* United States
- * Canada
- * Mexico
- * Rest of North America
- * Europe* Germany
- * United Kingdom
- * Italy
- * France
- * Spain
- * Netherlands
- * Poland
- * Belgium
- * Sweden
- * Rest of Europe
- * Asia-Pacific* China
- * India
- * Japan
- * Australia
- * Indonesia
- * South Korea
- * Thailand
- * Singapore
- * Rest of Asia-Pacific
- * South America* Brazil
- * Argentina
- * Colombia
- * Chile
- * Peru
- * Rest of South America
- * Middle East and Africa* South Africa
- * Saudi Arabia
- * United Arab Emirates
- * Nigeria
- * Egypt
- * Morocco
- * Turkey
- * Rest of Middle East and Africa

Frequently Asked Questions

How big is the adult diaper market in 2026?

The adult diaper market stands at USD 15.57 billion in 2026 and is on course to reach USD 24.44 billion by 2031.

What is driving the fastest growth segment?

Pant-style pull-ups are the fastest-growing category at a 9.70% CAGR because they combine slim profiles with underwear-like comfort.

Why are online sales accelerating?

E-commerce solves privacy concerns linked to incontinence products, helping online retail log a leading 10.59% CAGR from 2026 to 2031.

Which region offers the highest growth potential?

Asia-Pacific posts the strongest 10.31% CAGR, underpinned by China's rapidly expanding 65-plus population and rising health-care access.