



Euromonitor
International

Nappies/Diapers/Pants in the US

April 2026

Table of Contents

Nappies/Diapers/Pants in the US - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Nappies/Diapers/Pants Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Volume and Value Sales Decline, but Disposable Pants Gains Slight Volume Share

Premiumisation Drives Brand Innovation as Consumer Priorities Evolve

Chart 2 - The Honest Co's New Premium Clean Conscious Nappies/Diapers

Sustainability and Skin Health New Focuses for Product Design

Chart 3 - Texas Startup Introduces Nappies/ Diapers That Break Down Plastic Naturally

New Preemie Nappies/Diapers Demonstrate Move Towards Inclusivity

Chart 4 - Procter & Gamble Redefines Preemie Care

Chart 5 - Value Sales of Nappies/Diapers/Pants 2020-2030

Chart 6 - Volume Sales of Nappies/Diapers/Pants 2020-2030

Chart 7 - Value Sales of Nappies/Diapers/Pants by Category 2025

WHAT'S NEXT?

Growth Expected, but Demographic Challenges Mean Innovation Will Be Important

Brands Will Prioritise Comfort and Skin Health to Retain Consumer Trust

Chart 8 - Analyst Insight for Nappies/Diapers/Pants

Digital-First Engagement and Customisation to Reshape Purchasing Behaviour

Chart 9 - Forecast Value Sales of Nappies/Diapers/Pants 2020-2030

Chart 10 - Forecast Value Sales of Nappies/Diapers/Pants by Category 2025-2030

COMPETITIVE LANDSCAPE

The Top Two Players Maintain Their Dominance, but the Competition Is Increasing

Rising Competition From Insurgent Brands and Chinese Competitors

Coterie Acquisition Accelerates Premium Innovation and Reshapes the Competition

Chart 11 - Company Shares of Nappies/Diapers/Pants 2025

Chart 12 - Brand Shares of Nappies/Diapers/Pants 2025

CHANNELS

Discounters and Warehouse Clubs Capture Value as Shoppers Trade Down

Retail E-Commerce Grows as Digital Habits Reshape Purchasing Patterns

Chart 13 - Retail Channels for Nappies/Diapers/Pants 2020-2025

ECONOMIC CONTEXT

Chart 14 - Economic Context for Nappies/Diapers/Pants

Chart 15 - Real Gdp Growth 2020-2030

Chart 16 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 17 - Consumer Context for Nappies/Diapers/Pants

Chart 18 - Population 2020-2030

Chart 19 - Consumer Expenditure 2020-2030

Chart 20 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 21 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Ongoing Price Sensitivity Even as Inflation Eases

Innovation Drives Growth across Retail Tissue, Retail Adult Incontinence, and Menstrual Care

Several Categories See a Move Towards Premiumisation

Chart 22 - Procter & Gamble launches Always Pocket Flexfoam for Portability and Superior Protection

Needs of Eco-Conscious Consumers Addressed with New Nappy/Diaper Launch

Chart 23 - Cottonsie Introduces First-Ever All-Cotton Nappy/Diaper

Holistic Expansion through Fostering Emotional and Mental Connections

Chart 24 - Kimberly-Clark Releases Toilet Paper with Scented Tube

Chart 25 - Value Sales of Tissue and Hygiene 2020-2030

Chart 26 - Value Sales of Tissue and Hygiene by Category 2025

WHAT'S NEXT?

Retail E-Commerce and Natural Brands Set to Reshape Purchasing Habits

Chart 27 - Analyst Insight for Tissue and Hygiene

Retail Adult Incontinence to See Innovation for an Ageing Population

Sustainability, Digitalisation and Regulation Likely to Accelerate Product Transformation

Chart 28 - Forecast Value Sales of Tissue and Hygiene 2020-2030

Chart 29 - Forecast Value Sales of Tissue and Hygiene by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble and Kimberly-Clark Defend Their Lead Even as Challengers Gain

Chart 30 - Company Shares of Tissue and Hygiene 2025

Chart 31 - Brand Shares of Tissue and Hygiene 2025

CHANNELS

Hypermarkets Retains the Top Position While Retail E-Commerce Reshapes Convenience

Chart 32 - Retail Channels for Tissue and Hygiene 2020-2025

ECONOMIC CONTEXT

Chart 33 - Economic Context for Menstrual Care

Chart 34 - Real Gdp Growth 2020-2030

Chart 35 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 36 - Consumer Context for Menstrual Care

Chart 37 - Population 2020-2030

Chart 38 - Consumer Expenditure 2020-2030

Chart 39 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/nappies-diapers-pants-in-the-us/report.