



Nappies/Diapers/Pants in India

May 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Nappies/Diapers/Pants Summary

KEY INDUSTRY TRENDS

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

INDUSTRY PERFORMANCE

Robust Volume Growth as Incomes Rise, Penetration Increases, and Gst Is Cut

Chart 2 - GST Cut on Baby Nappies/Diapers Reduces Prices and Boosts Affordability in India

Disposable Pants Drives Volume and Value Gains and Reshapes the Product Mix Due to Convenience

Chart 3 - Little's Launches Fluffy Soft Diaper Pants in January 2025

Clean Wellness Gains Importance as Caregivers Look to Ensure Skin Health

Chart 4 - MamyPoko Introduces Enhanced Newborn Pants Focused on Skin Comfort

Chart 5 - Value Sales 2020-2030

Chart 6 - Volume Sales 2020-2030

Chart 7 - Value Sales by Category 2025

WHAT'S NEXT?

Dynamism Expected, with Disposable Pants Continuing Its Strong Rise

Brands Expected to Innovate with Segmentation and Digital Tools to Enhance Loyalty

Chart 8 - Analyst Insight for Nappies/Diapers/Pants

Connected Parenting Platforms to Reshape Product Choice and Engagement

Chart 9 - Forecast Value Sales 2020-2030

Chart 10 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Mamypoko Leverages Distribution and Digital Reach to Defend Its Leadership

Chart 11 - Company Shares 2025

Chart 12 - Brand Shares 2025

CHANNELS

Offline Retail Continues to Dominate as a Trusted, Accessible Channel

Retail E-Commerce Gains Ground as Parents Shift to Digital

Chart 13 - Retail Channels 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

Tissue and Hygiene in India - Industry Overview

EXECUTIVE SUMMARY

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 21 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Affordability Is Boosted by Gst?Rationalisation, Driving Growth

Chart 22 - GST Rationalisation Strengthens Affordability Across Hygiene Essentials

Clean Wellness Becomes a Core Requirement in Certain Categories

Chart 23 - Romsons Group Expands Hygiene Range with Poochie Play Pants Nappies/Diapers/Pants

Major Players Operationalise Sustainability for Epr Compliance

Chart 24 - Whisper, Stayfree and Pampers Scale Recyclable Packaging to Meet India's 2025 EPR Rules

Chart 25 - Value Sales 2020-2030

Chart 26 - Value Sales by Category 2025

WHAT'S NEXT?

Dynamic Growth as the Consumer Base Expands, Disposable Incomes Rise, and Convenience Is Valued

Chart 27 - Analyst Insight for Tissue and Hygiene

Away-From-Home Sales Expected to Rise as Institutional Adoption Increases

Brands Accelerate Circularity to Comply with New Waste Regulations

Chart 28 - Forecast Value Sales 2020-2030

Chart 29 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble and Unicharm Sustain Leadership Despite the Intensifying Competition

Chart 30 - Company Shares 2025

Chart 31 - Brand Shares 2025

CHANNELS

Offline Channels Anchor Everyday Sales in Tissue and Hygiene

Transformation in Distribution as Retail E-Commerce Maintains Its Dynamic Rise

Chart 32 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 33 - Economic Context for Tissue and Hygiene

Chart 34 - Real Gdp Growth 2020-2030

Chart 35 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 36 - Consumer Context for Tissue and Hygiene

Chart 37 - Population 2020-2030

Chart 38 - Consumer Expenditure 2020-2030

Chart 39 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

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-india/report.