



Euromonitor
International

Navigating Diaper Demand in the Baby Bust Economy

June 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

With fewer babies being born, regions undergo varied phases of baby bust

A deepening baby bust risks future diaper demand

Cost pressure and faltering birth rates have put diaper demand under pressure

Consumers remain drawn to top names, but smaller players are gaining popularity

Evidence shows growth possible even in the most baby-busted economies

How businesses can successfully navigate diaper demand

TACKLE NEGLECTED USERS AND NEED GAPS

Despite declining births, per capita demand offers key growth prospects in diapers

Develop diapers for a wider user base and occasions to deepen demand penetration

Colombia: Winny by Tecnoquímicas expands diaper range for premature babies

South Korea: Pampers' summer line features temperature regulation attribute

Vietnam: Unicharm's mosquito-repellent diapers fight immunity-compromising disease

The global south faces challenging prospect of a large user base with income gaps

Hayat grows share in Africa with local supply chain and multi-brand, multi-tier strategy

SHARPEN WELLNESS-LED VALUE SHIFT

With delayed motherhood, parents project stronger spending propensity

Function, comfort and skin safety are key anchors of diaper spending

Pants as the most dynamic diaper segment demonstrates consumers' value shifts

Science backing, clinical certifications and packaging callouts build value perception

Skin care-forward clean ingredients resonate with the growing natural-health linkage

US: Price sensitivity requires more specialised attributes to justify higher prices

United Arab Emirates: PineSmart extends diaper function to infection prevention

DEMOCRATISE SHOPPER JOURNEY

Consumers' evolving trust in information shapes diapers' path to purchase

Consumers embrace omnichannel experience, prioritising price and convenience

Baby care marketplace FirstCry democratizes brands' visibility across India

Indonesia: Makuku harnesses mom-led influencer marketing to solidify trust

Japan: Unicharm's B2B subscription model further expands product reach

Babycare's winning formula in China: A multilayered, parents-centric approach

IDENTIFY LOGICAL ADJACENCIES BEYOND DIAPER CARE

Unlock growth beyond diapers: Explore high-impact adjacencies for diaper brands

From skin to clothing, baby care provides scope for user-centric adjacency expansion

Lifestyle positioning and retail partnerships aid Honest's baby adjacency expansion

Winning motherhood: A new frontier beyond baby care

Postpartum care as an increasingly recognised natural adjacency to baby care

Senior hygiene helps soften baby bust's blow, building on the rapid ageing trend

CONCLUSION

Navigating diaper demand: How to win

The evolution of demand for baby diapers

Questions we are asking

Customisable solutions to help you explore what's next, where to play and how to win

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/navigating-diaper-demand-in-the-baby-bust-economy/report.