

North America's incontinence care products market Size, Share, Outlook By 2021- 2028

Market Overview North America's incontinence care products market is expected to grow at a high CAGR during the forecasting period (2021-2028).



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Incontinence is the inability to control the evacuative urination or defecation functions of the body. A large population suffers from chronic urinary and fecal incontinence problems in North America, which leads to rising demand for incontinence care and management products.

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Incontinence is also caused by spinal cord injury (SCI), traumatic brain injury (TBI), and Post Traumatic Stress Disorders (PTSD) injuries that predominantly affect young men, many of them military veterans.

The North American incontinence care products market is fragmented, with several companies offering catheter products to various end-users. Some of the major players are Wellspect, Inc., Hollister Incorporated, Domtar Corporation, Kimberly-Clark Corporation, Ontex, Procter & Gamble. Companies are focusing on research and development activities to expand their portfolio by manufacturing innovative products.

The key players are adopting various growth strategies such as product launches, acquisitions, and collaborations, contributing to the Incontinence Care Products market in North America. For instance,

In May 2019, Kimberly-Clark announced the launch of the Poise UltraThin Active Collection, a range of pads and liners with wings for more stability among women.

In November 2017, Essity introduced New ConfioAir Breathable Technology that will be used to manufacture all the company's briefs, underpants, and other incontinence products.

COVID-19 Impact Analysis:

With the recent outbreak of the COVID-19 pandemic. Coronavirus, the whole world is being impacted in various sectors.

During this crisis, the doctors and paramedical staff must wear a Personal protection kit or PPE, which covers them from head to toe before they treat patients. The suit includes goggles, masks, and gloves that cover them completely. The global standards limit the usage of one set of PPE suits for 6-7 hours. However, due to the increasing number of cases, there is a major rift between the demand and supply of these protective suits. The shortage causes pressure on healthcare professionals to save resources, which makes them stay straitjacketed for almost seven hours whilst avoiding drinking water and bathroom breaks.

To remain on top of this situation, professionals use leak-proof diapers for adults. Doctors are resorting to adult diapers for men and women to save the bathroom trip altogether.

Moreover, it is a disaster for the female staff on their periods and needs to change their pads or tampons regularly.

As the Coronavirus spreads more quickly in low temperatures, hospitals are switching off ACs and fans even during this weather, which can further cause dehydration, fatigue, mobility impairment, etc. In situations like these, adult diapers for men and women act as a blessing in disguise for these

professionals by drinking enough water to battle the weather's heat and humidity. Also, it acts as the perfect solution while working through a shortage of PPE kits.

The adult diapers for men and women allow the medical staff to fight the pandemic without further jeopardizing their personal health effectively. On the contrary, holding their pee can lead to several other infections and be highly risky for frontline professionals. Hence, apart from aiding people to manage several incontinence types, leak-proof diapers for adults serve as a great help for all doctors and paramedics.

Market Dynamic

The rising geriatric population is one of the major factors responsible for the rise in incontinence care products, which is expected to drive the incontinence care products and devices market.

Chronic kidney disease (CKD) is more common in people aged 65 years or older (38%) than in people aged 45–64 years (13%) or 18–44 years (7%), according to the Centers for Disease Control and Prevention (CDC).

Several countries are facing challenges due to the ongoing and increasing demographic shift in age among their people.

According to the U.S. Census Bureau, there were 40.3 million U.S. residents 65 years and older in the 2010 Census and more than 54 million on July 1, 2019.

The number of Americans ages 65 and older is projected to nearly double from 52 million in 2018 to 95 million by 2060. The 65-and-older age group's share of the total population will rise from 16 percent to 23 percent.

By 2018, 24% of men and about 16% of women ages 65 and older were in the labor force. These levels are projected to rise further by 2026, to 26 percent for men and 18 % for women.

Advancements in incontinence products have resulted in a significant rise in the geriatric population's adoption of disposable adult diapers.

Manufacturers are continuously introducing new products in the market, which is boosting the growth of the market. For instance:

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In 2018, Enka Hijyen, a member of Imam Kayalı Holding that has been producing disposable baby diapers since early 2016, launched adult diapers under the Paddlers brand. Paddlers adult diapers are easy to adjust to those who are suffering from moderate to severe incontinence. Its soft and breathable texture offers comfort and optimal protection. Paddlers are suitable for users with sensitive skin, and the diapers feature a textile back sheet, super absorbent particles, an extra dryness layer, and four strong side tapes.

In October 2016, Nobel Hygiene introduced a Friends Overnight adult diaper in the Indian market. Friends Overnight, the new variant is specifically targeted towards seniors who are deprived of a good night's sleep due to incontinence and other health issues. The new product offers up to 16 hours of absorption to ensure that a user's night remains unaffected and his sleep uninterrupted. The product also features a premium, cloth-like comfortable feel along with added leak-guard protection.

Market Segmentation

Product Type

- Absorbents
- Underwear
- Adult Briefs
- Pads and Liners
- Bladder Control Pads
- Incontinence Liners
- Guards & Shield
- Belted and Beltless Under Garments
- Drip Collectors & Bed Protectors
- Others

By Distribution Channel

- Supermarkets/Hypermarkets
- Retail Stores
- Coffee Specialty Stores
- E-commerce
- Others

By Usability

- Disposable
- Reusable
- Others

By Gender

- Female
- Male

By Distribution Channel

- Retail Stores
- Hospital/Clinics
- Online Channels
- Others

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