



Euromonitor
International

Retail Adult Incontinence in South Africa

May 2026

Table of Contents

Retail Adult Incontinence in South Africa - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Rapid Home Delivery Continues to Improve Access to Essential Care

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Rapid Home Delivery Continues to Improve Access to Essential Care

Super Absorbent Polymer Technology Enables Thinner and More Discreet Products

Chart 2 - Value Sales 2020-2030

Chart 3 - Volume Sales 2020-2030

Chart 4 - Value Sales by Category 2025

WHAT'S NEXT?

Ageing Population Projected to Support Category Growth

Private Label Retailers Set to Capture Value-Driven Shoppers

Chart 5 - Analyst Insight for Retail Adult Incontinence

Sustainability Expected to Become a Key Differentiating Factor

Chart 6 - Forecast Value Sales 2020-2030

Chart 7 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Household Name Brands Defend Lead as Private Label Grows

Chart 8 - Company Shares 2025

Chart 9 - Brand Shares 2025

CHANNELS

Dis-Chem and Clicks Focus on Growing Store Numbers to Drive Sales

Chart 10 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 11 - Economic Context for Retail Adult Incontinence

Chart 12 - Real Gdp Growth 2020-2030

Chart 13 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 14 - Consumer Context for Retail Adult Incontinence

Chart 15 - Population 2020-2030

Chart 16 - Consumer Expenditure 2020-2030

Chart 17 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in South Africa - Industry Overview

EXECUTIVE SUMMARY

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 18 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

Convenience and Affordability Remain Key Purchase Drivers for South African Parents

Chart 19 - L'il Masters: Affordable Diapers

Always Wins Trust as Parents and Women Choose Comfort over Cost

Chart 20 - Always Maxi Slim Foregrounds Comfort and Security

Chart 21 - Value Sales 2020-2030

Chart 22 - Value Sales by Category 2025

WHAT'S NEXT?

South African Consumers Expected to Become Increasingly Driven by Price-To-Value Ratio

Nappies/Diapers/Pants and Retail Adult Incontinence Set to Drive Category Growth

Chart 23 - Analyst Insight for Tissue and Hygiene

Chart 24 - Forecast Value Sales 2020-2030

Chart 25 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Retain Lead in Key Categories, Despite Intensifying Value Focus

Chart 26 - Company Shares 2025

Chart 27 - Brand Shares 2025

CHANNELS

Supermarkets Expand Delivery Capabilities to Reinforce Consumer Loyalty

Grocery Delivery Boosts E-Commerce but Offline Retail Remains Dominant

Chart 28 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 29 - Economic Context for Tissue and Hygiene

Chart 30 - Real Gdp Growth 2020-2030

Chart 31 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 32 - Consumer Context for Tissue and Hygiene

Chart 33 - Population 2020-2030

Chart 34 - Consumer Expenditure 2020-2030

Chart 35 - 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/retail-adult-incontinence-in-south-africa/report.