



Retail Adult Incontinence in New Zealand

May 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Contiflow'S Reusable Trial Sets Affordability and Sustainability Agenda

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Contiflow'S Reusable Trial Sets Affordability and Sustainability Agenda

Chart 2 - Contiflow's 2025 Reusable Incontinence Pilot Targets Long- Term Affordability

Light Adult Incontinence Dominates, but Moderate/Heavy Drives Growth

Continence Nz Drives Awareness as Ageing Fuels Product Demand

Chart 3 - Continence NZ's 2025 Awareness Push Highlights Growing Need Among Ageing New Zealanders

Chart 4 - Value Sales 2020-2030

Chart 5 - Volume Sales 2020-2030

Chart 6 - Value Sales by Category 2025

WHAT'S NEXT?

Light Solutions Set to Maintain Lead as Comfort and Dignity Reshape Preferences

Eco-Friendly Solutions and E-Commerce Will Reshape Business Strategies

Chart 7 - Analyst Insight for Retail Adult Incontinence

Chart 8 - Forecast Value Sales 2020-2030

Chart 9 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Essity and Kimberly-Clark Reinforce Dominance through Trust and Innovation

Reusable Innovations and Niche Brands Create New Growth Avenues

Chart 10 - Company Shares 2025

Chart 11 - Brand Shares 2025

CHANNELS

Supermarkets Dominate with Convenience

Online Subscriptions and Specialist Platforms Reshape Shopping Habits

Collaborations Help Drive Innovation with Education and Workplace Solutions

Chart 12 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 13 - Economic Context for Retail Adult Incontinence

Chart 14 - Real Gdp Growth 2020-2030

Chart 15 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 16 - Consumer Context for Retail Adult Incontinence

Chart 17 - Population 2020-2030

Chart 18 - Consumer Expenditure 2020-2030

Chart 19 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Woolworths and Foodstuffs Drive Value Shift as Shoppers Prioritise Essentials

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Woolworths and Foodstuffs Drive Value Shift as Shoppers Prioritise Essentials

Chart 21 - Private Label Ranges Help Customers Through Cost of Living Challenge

Sorbent Leverages Premium Innovation to Sustain Value Despite Trading Down

Chart 22 - Sorbent Luxe & Large Premium 3-Ply Toilet Tissue

Essity'S Geothermal-Powered Production Secures Eco-Conscious Loyalty

Chart 23 - Value Sales 2020-2030

Chart 24 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label to Gain Volume Share as Value-Conscious Shoppers Drive Polarisation

Domestic Producers Will Gain Advantage as Sustainability Becomes Non-Negotiable

Chart 25 - Analyst Insight for Tissue and Hygiene

Ageing Population to Accelerate Growth in Adult Incontinence and Lifestyle Hygiene

Chart 26 - Forecast Value Sales 2020-2030

Chart 27 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Private Label Gains Erode Leaders' Share as Affordability Drives Loyalty Shifts

Chart 28 - Company Shares 2025

Chart 29 - Brand Shares 2025

CHANNELS

Supermarkets Strengthen Hold as Shoppers Seek Weekly Convenience

Retail E-Commerce Captures Loyalty with Bulk and Privacy-Focused Offers

Chart 30 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 31 - Economic Context for Tissue and Hygiene

Chart 32 - Real Gdp Growth 2020-2030

Chart 33 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 34 - Consumer Context for Tissue and Hygiene

Chart 35 - Population 2020-2030

Chart 36 - Consumer Expenditure 2020-2030

Chart 37 - 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-new-zealand/report.