



Retail Adult Incontinence in Australia

April 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Affordability Drives Consumer Loyalty and Trade-Down

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Affordability Drives Consumer Loyalty and Trade-Down

Chart 2 - Aldi Sana Sets Value Standard

Light Adult Incontinence Leads Growth through Convenience

Chart 3 - Cole's Assure Men

Evidence-Based Premiumisation Becomes More Popular

Chart 4 - MoliCare New Range

Chart 5 - Value Sales 2020-2030

Chart 6 - Volume Sales 2020-2030

Chart 7 - Value Sales by Category 2025

WHAT'S NEXT?

Affordability to Remain a Permanent Value Driver

Light Adult Incontinence to Maintain Dominance Amid Rising Active Population

Loyalty to Be Determined through Transparency and Credibility

Chart 8 - Analyst Insight for Retail Adult Incontinence

Chart 9 - Forecast Value Sales 2020-2030

Chart 10 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Tena Sustains Trust Due to Well-Known Brand Image

Confidenceclub Reshapes Expectations with Design-Led Innovation and Digital-First Delivery

Chart 11 - Company Shares 2025

Chart 12 - Brand Shares 2025

CHANNELS

Coles and Woolworths Drive Routine Shopping as E-Commerce Surges on Privacy and Convenience

Confidenceclub Direct-To-Consumer Model Grows Retail Channel Presence

Chart 13 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 14 - Economic Context for Retail Adult Incontinence

Chart 15 - Real Gdp Growth 2020-2030

Chart 16 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 17 - Consumer Context for Retail Adult Incontinence

Chart 18 - Population 2020-2030

Chart 19 - Consumer Expenditure 2020-2030

Chart 20 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in Australia - Industry Overview

EXECUTIVE SUMMARY

Affordability Significantly Influences Tissues and Hygiene Performance

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 21 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Affordability Significantly Influences Tissues and Hygiene Performance

Chart 22 - Woolworth's Affordability Expansion

Sustainability Shifts From a Rising Trend to a Government Requirement Amid Eco-Regulations

Chart 23 - Essity Debuts Geothermal-Powered Tissue Production

Digital-First Hygiene Supported by the Mainstream Adoption of E-Commerce

Chart 24 - Value Sales 2020-2030

Chart 25 - Value Sales by Category 2025

WHAT'S NEXT?

Convenience, Consistency and an Ageing Population Set to Boost Incontinence Sales

Automated Replenishment and Operational Transparency to Drive Loyalty

Trust and Authenticity to Influence Thoughtful Spending Habits

Chart 26 - Analyst Insight for Tissue and Hygiene

Chart 27 - Forecast Value Sales 2020-2030

Chart 28 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark Pty Ltd Defends Lead as Challengers Gain through Digital and Sustainability

Emerging Brands Cleanlife and Kine Australia Grow Awareness through Innovation

Femlibre's Free Menstrual Care Model Reshapes Expectations

Chart 29 - Company Shares 2025

Chart 30 - Brand Shares 2025

CHANNELS

Everyday Essentials Drive Grocery Retailer Dominance

Emerging Brands and Collaborations Set New Standard, Impacting Purchasing Decisions

Chart 31 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 32 - Economic Context for Menstrual Care

Chart 33 - Real Gdp Growth 2020-2030

Chart 34 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 35 - Consumer Context for Menstrual Care

Chart 36 - Population 2020-2030

Chart 37 - Consumer Expenditure 2020-2030

Chart 38 - 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-australia/report.