



For Credence Research Inc.

24/09/25

Proprietor

India

Hygiene Product Market

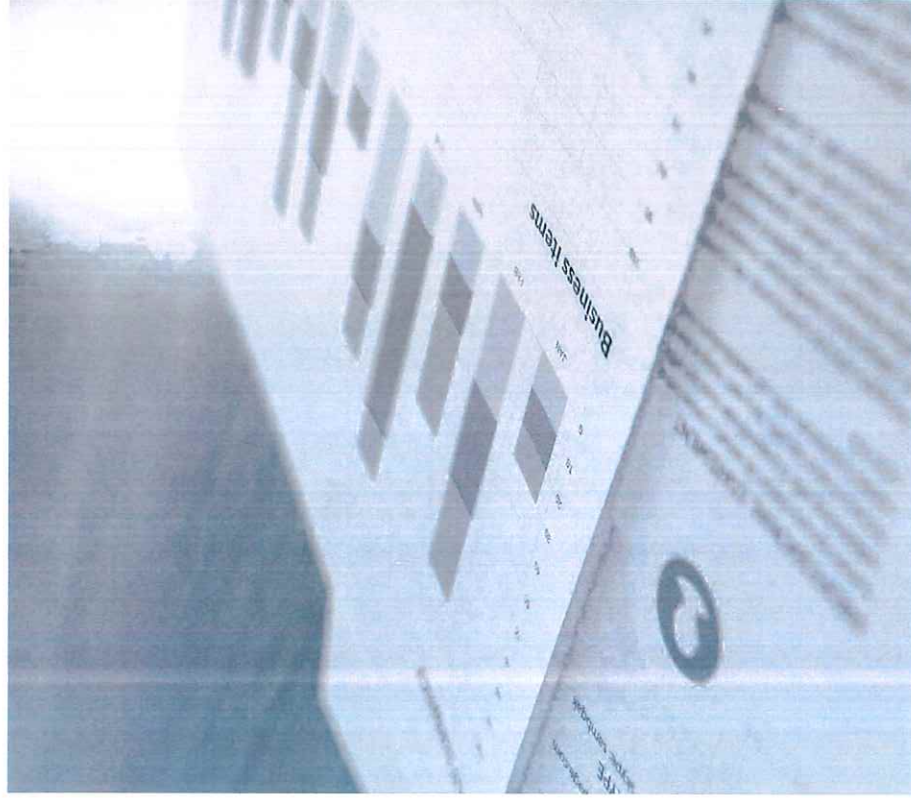
2018 to 2030

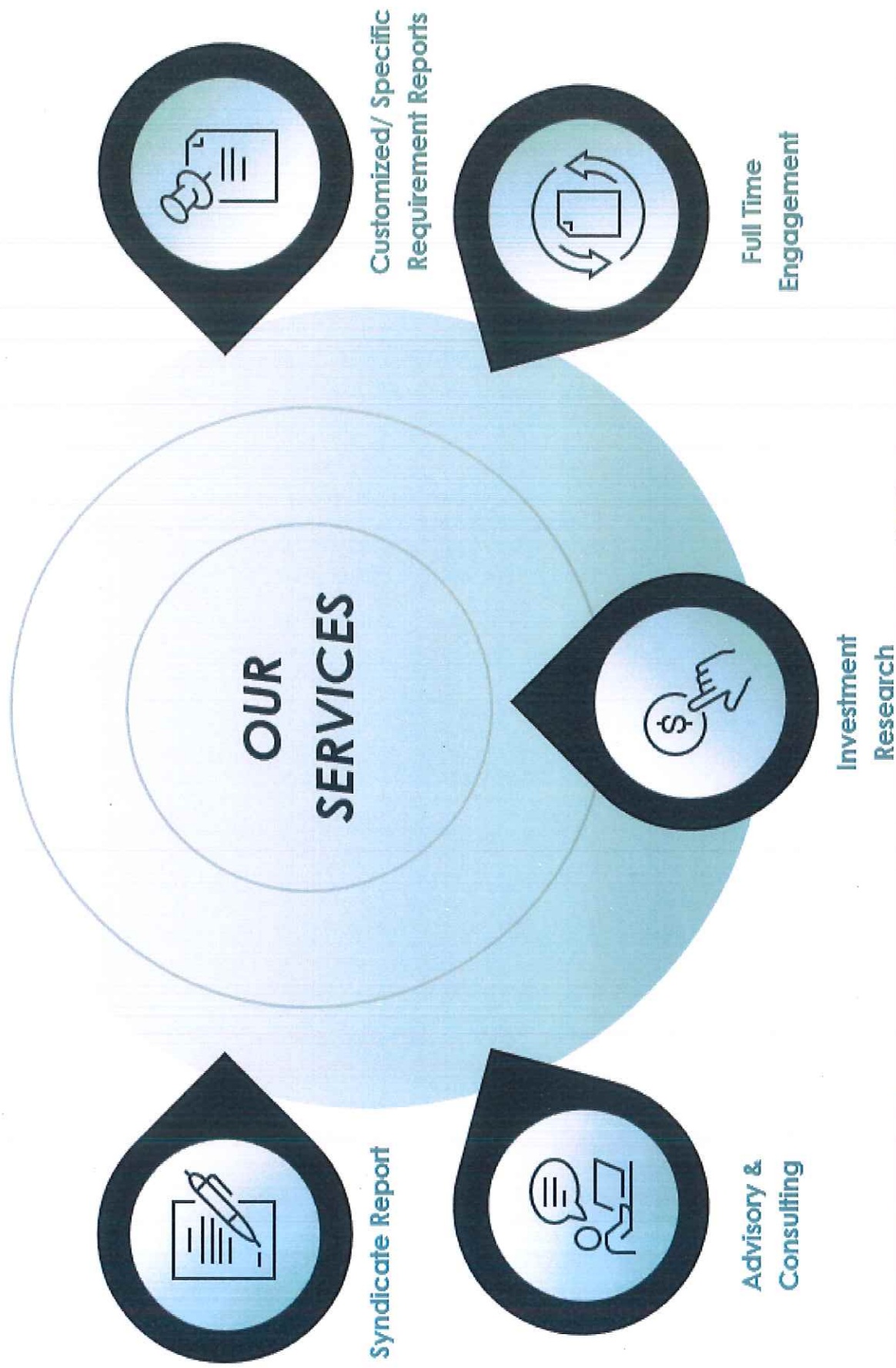
About Us

Credence Research (CR)

is a top-tier international market intelligence provider that helps business leaders and investors make well-informed decisions by offering detailed, reliable due diligence. The firm's approach involves a thorough blend of primary and secondary research, expert interviews, and advanced data modeling. This rigorous methodology, combined with extensive data acquisition agreements, results in authoritative and highly detailed reports that are widely used as primary sources for evaluating market performance and opportunities.

Clients frequently praise Credence Research for its thoroughness, deep sector knowledge, and global responsiveness. The firm's reports are made-to-order, utilizing the latest available datasets to ensure the intelligence provided is up-to-the-minute and reflects current market trends. This commitment to quality and relevance empowers clients with the essential tools to mitigate risks and achieve successful business outcomes.





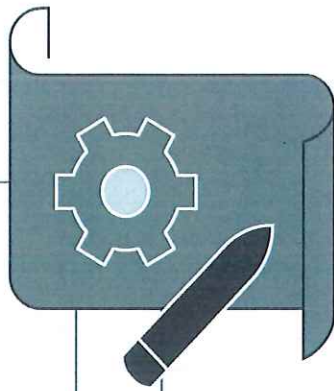
For Credence Research Inc.

3 | Page

RESEARCH DESIGN

Primary Research

Primary Research	Core Product market Value Chain			
	Porters Five Forces & geographic usage pattern			
Historical Data	Introduction	Consumption Trend by type	Sales Channel analysis	Strategic benchmarking
	Market Share	Competitive landscape		
Influencing factors (Market trends and Dynamics)	Market Drivers Market Driver 1 Market Driver 2 Market Driver 3 Market Driver 4	Market Restraints Market Restraints 1 Market Restraints 2 Market Restraints 3		Market Opportunities Market Opportunities
		Key issues		
		Regional Analysis Market Driver 1 Market Driver 2		
Forecast	Historical data of the market	Market size and forecast by type		Arrive at the market size, share and CAGR for the market
	Impact analysis of market trends	Market size and forecast by other segments		

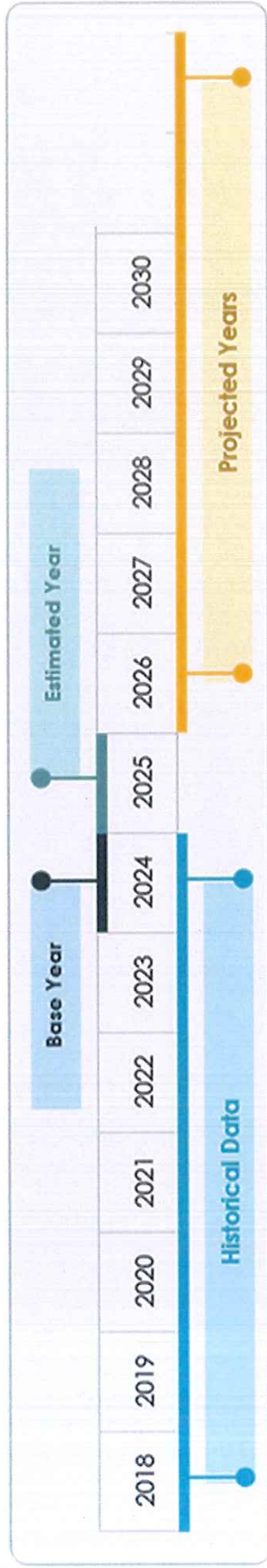


24/09/25

Surya

Proprietor

YEARS CONSIDERED FOR THE STUDY



The market sizes data and trends in the report are collected and duly validated through primary research (~60%) and secondary research (~40%). Apart from this, there are numerous techniques and factors considered while collecting, deriving, and calculating the market sizes, trends, and projections while analyzing industry segmentations and analyzing competitive landscape. We also conduct surveys, interviews, focus groups, and field trials.

We keenly look into adoption rate, product/service penetration, patent analysis, marketing activities, etc. for analyzing data and trends prevalent in the market. We exercise top down and bottom-up research methodologies to ensure the appropriate reliability of the data and to point out any areas requiring further research for reconciliation.

Before delivering the report, our expert panel scrutinizes, prioritizes, and summarizes different analysis, impacting factors, data gathered and in-house data. The data represented in our report is up to date with expected deviations of 5 – 10% in projections whereas the historical data (2018 – 2023) represented in the report is the actual data with authenticated sources of validation.

Global Market

TOP-DOWN APPROACH

Primary Research

- Online and Telephone based surveys
- Interviews with industry key opinion leaders
- Vendor briefing

Qualitative Research

- Trends, drivers, challenges, and opportunities
- Company profiles
- Solution Deployment and Industry Ecosystem Analysis

BOTTOM-UP APPROACH

Secondary Research

- Paid databases
- Company annual reports
- Product/solution and services literature
- Industry journal
- Trade publications

Quantitative Research

- Market size estimations and forecast
- Projection and data sampling
- Subscription price analysis
- Statistical models

For Credence Research Inc.

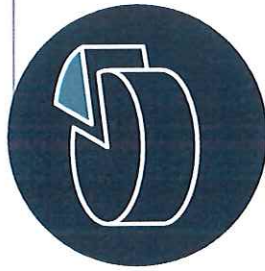
24/04/25

Proprietor

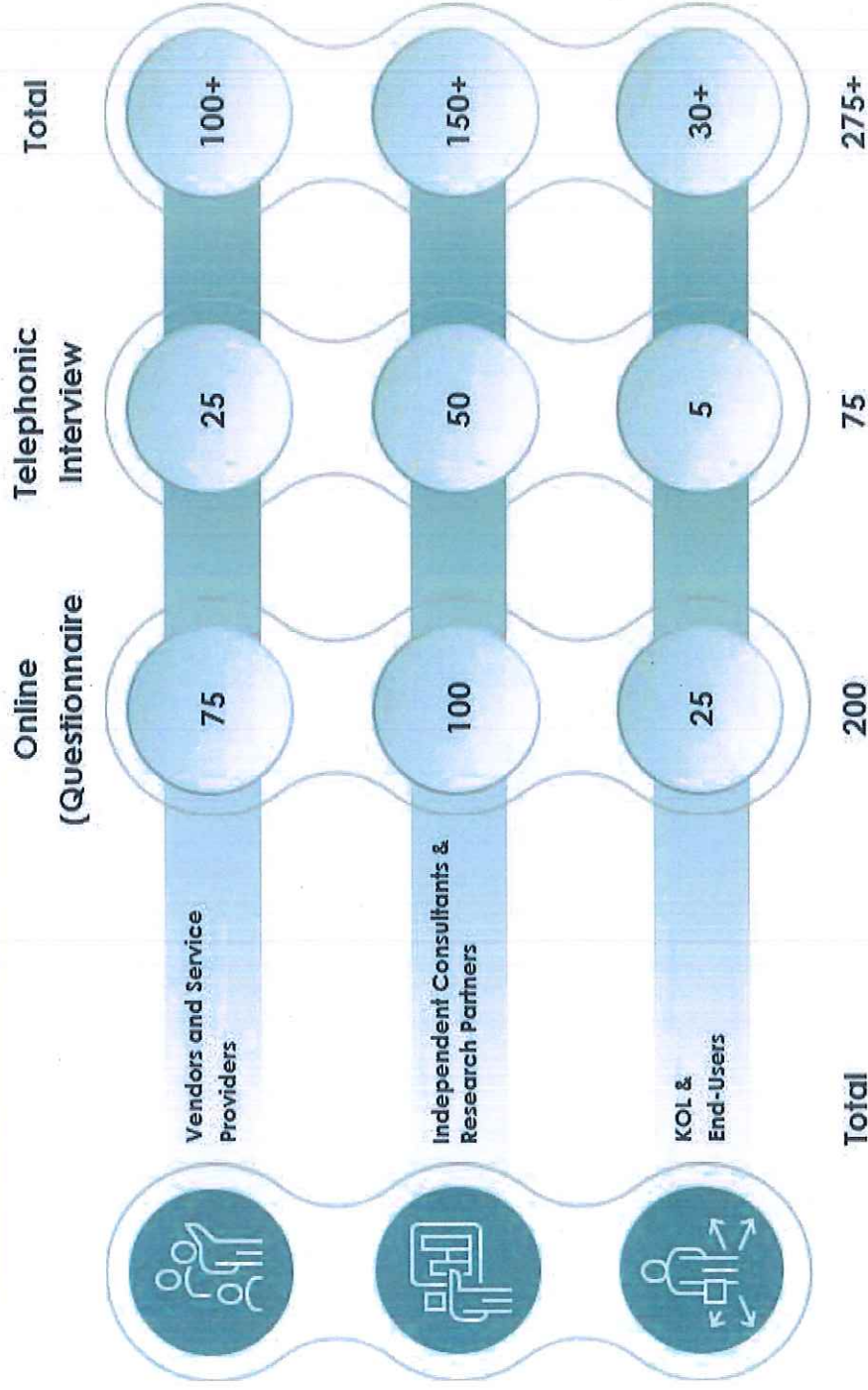
Primary research involves E-mail interactions, telephonic interviews as well as face-to-face/video-conferencing interviews for each market, category, segment and sub segment across geographies

The participants in the process include, but are not limited to:

- Industry participants: CEOs, VPs, marketing/ type managers, market intelligence managers and national sales managers, purchasing managers, technical personnel, distributors, corporates, service providers, system providers / assemblers, an independent consultants among other stakeholders operating in respective Industry
- Outside experts: Investors, valuation experts, technical experts, research analysts specializing in concerned markets
- Key opinion leaders specializing in different areas corresponding to different industry verticals
- End-users/Customers
- Distributors
- Payers across ecosystem of respective industry



Below is the total number of primary interviews conducted to derive market size for each of the report published at Credence Research as a standard practice. These participants were from different companies. And following is the distribution of those participants. In our organization, after every project we prepare following chart which help us in internal quality evaluation process.
This data provides few additional pointers as well which we think might help you.



Note that as per our company policy, and non-disclosure agreement we signed with our primary participants, it won't be possible for us to share any of information about primary participant and therefore, we have replaced actual names of participant and the company.
When we say online it means these are the participants which are providing us duly filled questionnaire either over third-party survey sites or over mail.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings
- Internal and external proprietary databases, relevant patent and regulatory databases
- National government documents, statistical databases and market reports
- News articles, press releases and web-casts specific to the companies operating in the market

The paid sources for secondary research like Factiva, OneSource, Hoovers, and Statista

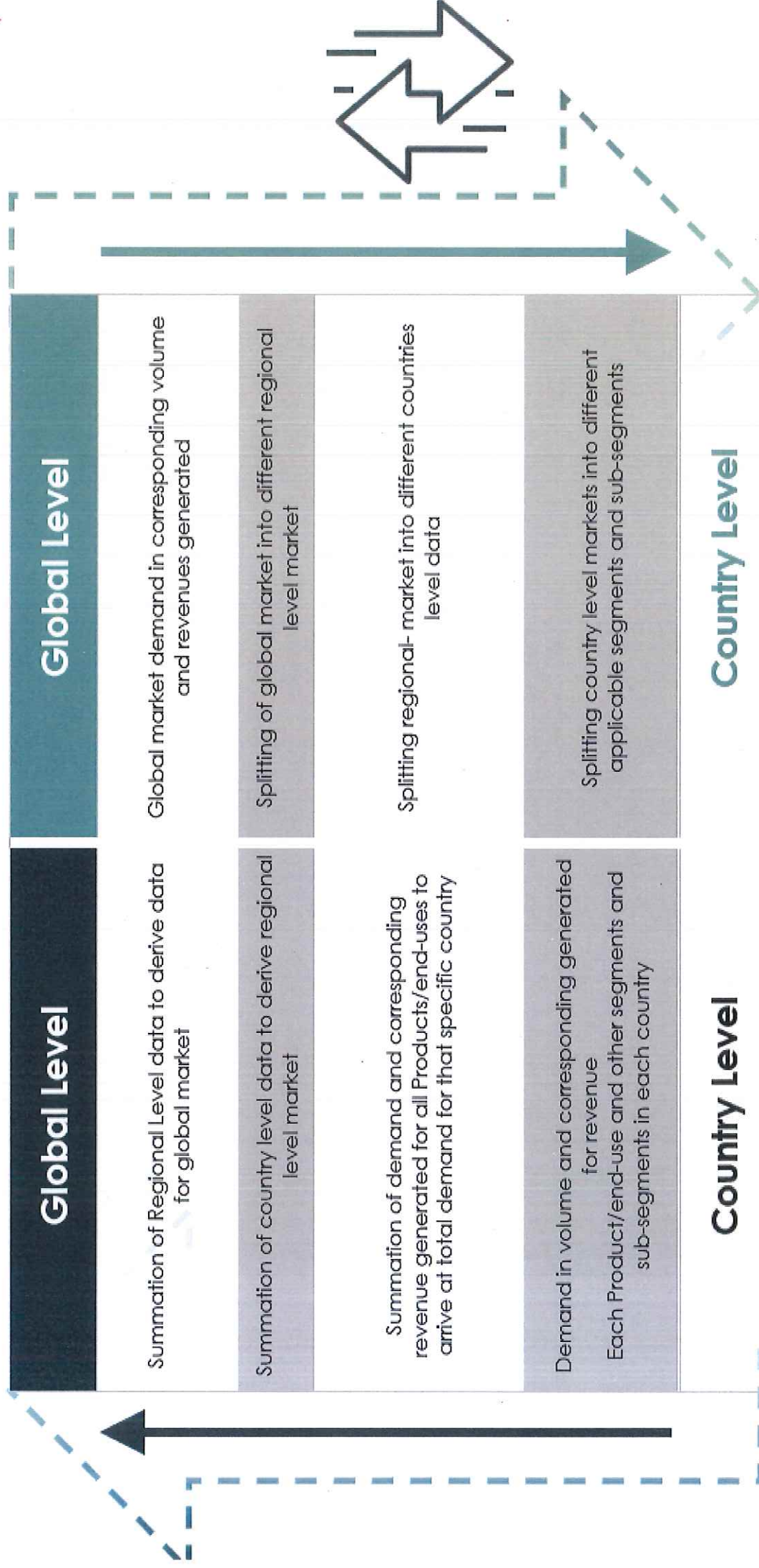
Other major sources: WHO Database Program, The Indian Beauty & Hygiene Association, National Databases, Statista, National Statistics, OECD, etc.

This data was then further validated by tracking manufacturers, vendors, distributors, suppliers, assemblers, and service providers through primary interviews, surveys, and secondary sources. The data provided by these stakeholders was compiled to sum up the total number for market. This data was then classified and indexed by different end-user industries such as academic, corporate, large enterprises, and small & medium enterprises among others.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings
- Internal and external proprietary databases, relevant patent and regulatory databases
- National government documents, statistical databases and market reports
- News articles, press releases and web-casts specific to the companies operating in the market
- Factiva, Hoovers, Statista

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030



Company share analysis model can be built for any market irrespective of industry. This model is used to derive the size of market. As well as study of revenues of companies for last three to five years also provide the base for forecasting the market size and its growth rate.		Listing of Companies Procter & Gamble H R Hygiene Pvt. Ltd Kimberly-Clark India Pvt Ltd. Redcliffe Hygiene Private Limited Unicharm India Private Limited JNTL Consumer Health (India) Private Limited (Kenvue) Ginni Filaments Limited Wellify (Piramal group) Sirona Nobel Hygiene Private Limited	
---	--	---	--

FINDING SIZE OF MARKET	VALIDATION
Finding the share these companies holding in the market and using that share and sum of revenue of these companies to calculate market. For instance, summation segmental revenues of these 10 companies is 1200 million and holding 80% share, then the market size will be = 1200/80% =1500 million	There are two points which are validated from primary participants - The size of market estimated from third step and - Based on size of market (from step 3 and company's segmental revenue (from step 2), share of each company is then calculated and validated

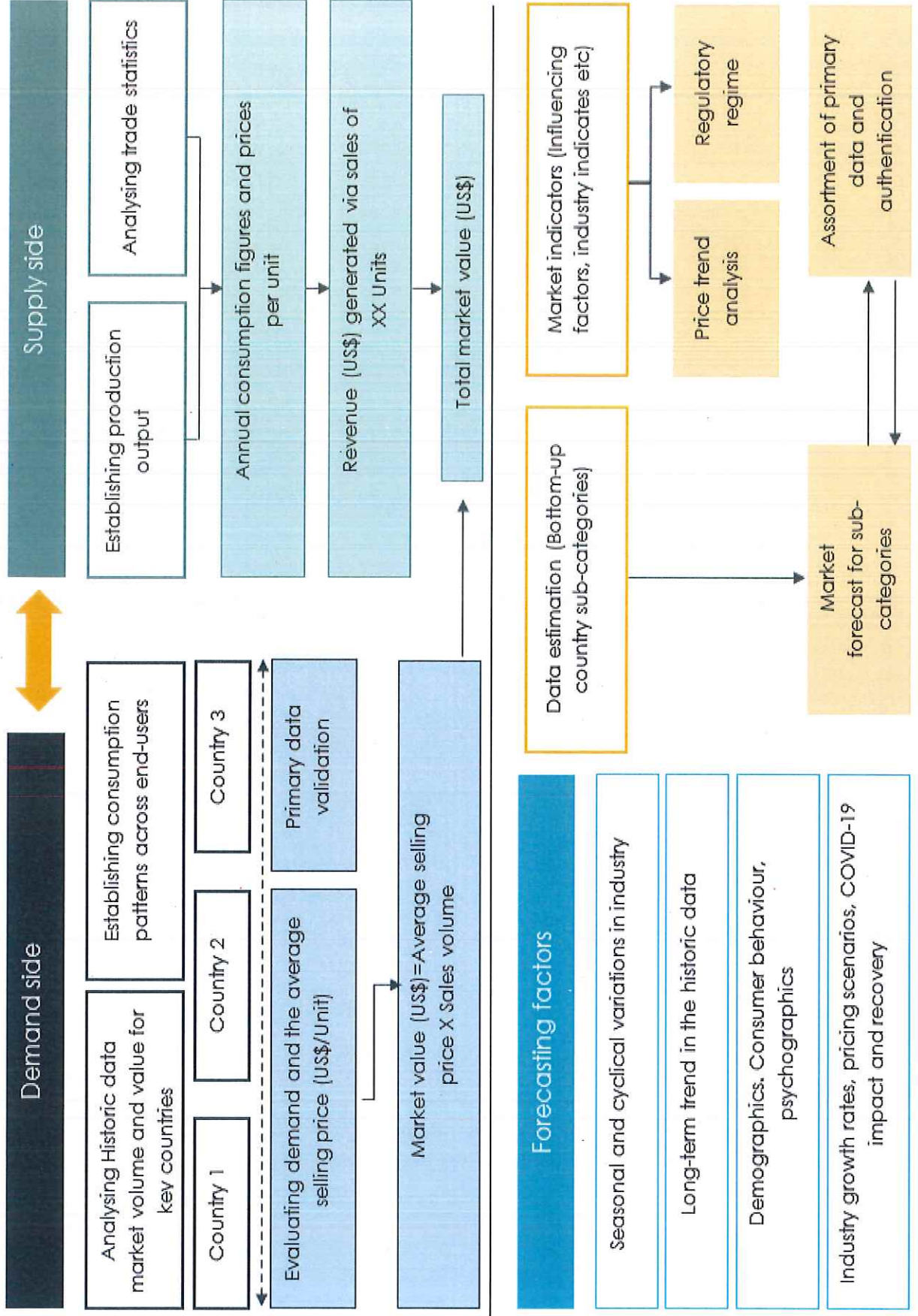
RESEARCH METHODOLOGY ESTIMATION AND FORECASTING FACTORS

Phase 1: Data Compilation,

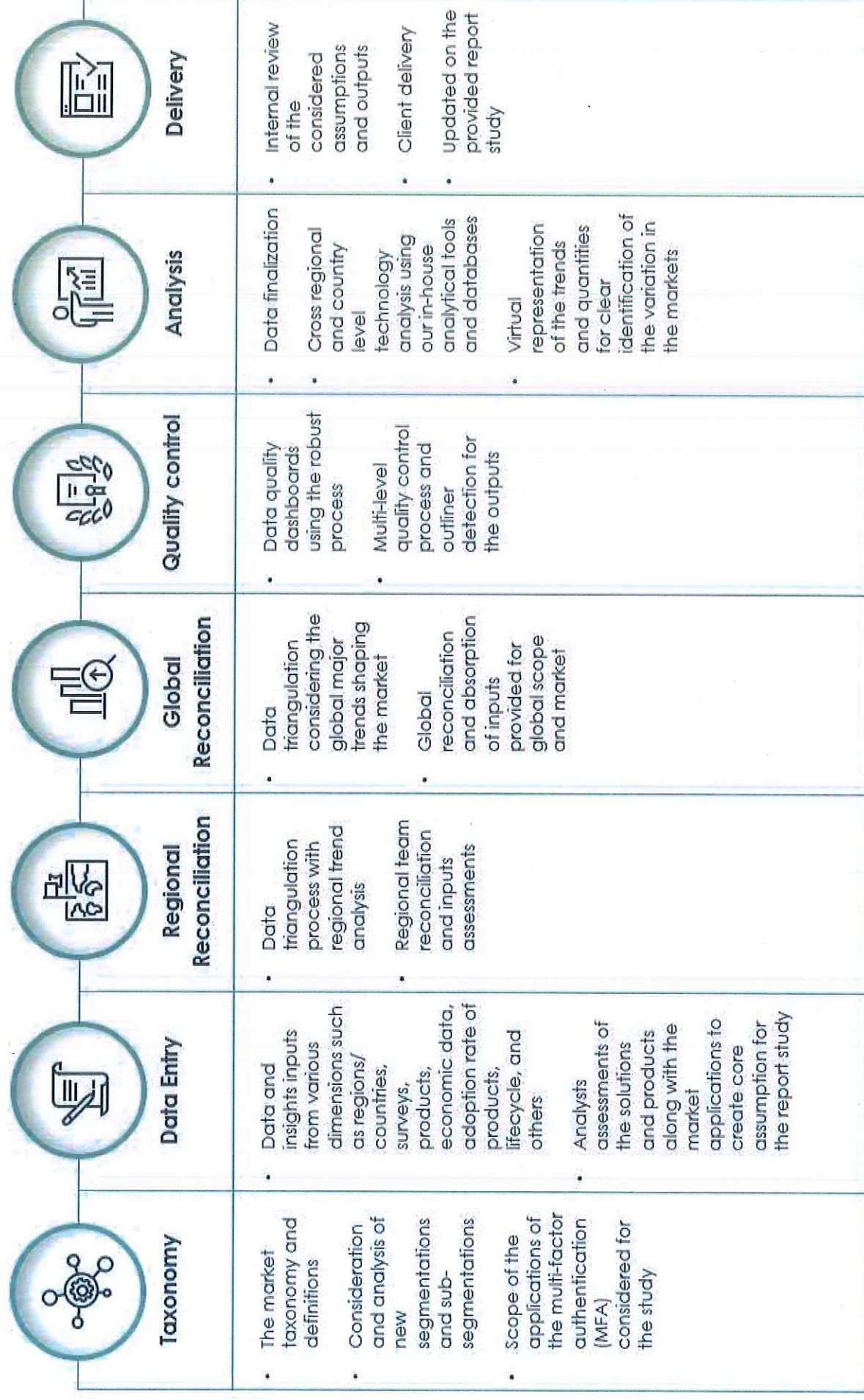
2018-2023

Phase 2: Market Forecasting,

2024-2032



Demand Supply Modelling



INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

OBJECTIVES OF THE STUDY	
	To define, describe, and forecast the India Hygiene Product Market by Product and Sales Channel
	Total Addressable Market and Market sizing in terms of Value (USD Million)
	To provide detailed information regarding the factors influencing the growth of the Market (such as drivers, restraints, opportunities, and challenges)
	To strategically analyze micro-Markets with respect to individual growth trends, prospects, and contributions to the India Hygiene Product Market
	To analyze Market opportunities for all the stakeholders and provide details of the competitive landscape for Market leaders
	To forecast the size of the Market segments in India
	To profile key operating players and comprehensively analyze their Product portfolios, Market positions, Market shares, and core competencies
	To track and analyze competitive developments, such as Product launches, expansions, collaborations, agreements, and acquisitions in the India Hygiene Product Market
	Supply and demand analysis of the India Hygiene Product Market country-wise

The India Hygiene Product Market encompasses a wide range of personal care and sanitary products designed to maintain cleanliness, comfort, and health across different age groups and needs. Key segments include baby diapers, adult diapers, sanitary pads, tampons and menstrual cups, wipes, and cotton swabs. These products cater to diverse consumer groups from infants and elderly individuals requiring specialized care to women seeking effective menstrual hygiene solutions. Growing awareness about health and sanitation, combined with rising disposable incomes and urbanization, is driving demand across both rural and urban areas. The market is characterized by increasing innovation in product design and materials, including biodegradable and skin-friendly options, to meet evolving consumer preferences and regulatory requirements. Distribution channels range from traditional retail outlets to rapidly expanding e-commerce platforms. Government initiatives promoting menstrual hygiene and public health, along with social campaigns, are also accelerating adoption. As India continues to prioritize sanitation and hygiene, this market is poised for significant growth, with a focus on sustainability and affordability.

LIMITATIONS

Some of the companies in this Market are privately owned, and their revenues are not available in the public domain. Hence, the revenues for those companies are estimated based on paid primary interviews and surveys along with paid external third-party databases.

The weighted average price for each product category has been taken into account while estimating and forecasting Market revenue on a global basis.

Regional weighted average prices have been considered while breaking down this market by all segments in country.

Inflation is not a part of pricing analysis and revenue calculations in this report. Prices of hygiene product vary in each zone and hence similar revenue ratio does not follow for each individual country.

Company developments not reported in the public domain are not included in the report.

Product
Baby Diapers
Sanitary Pads
Adult Diapers
Wipes
Cotton Swabs
Tampons and Menstrual Cups

Sales Channel
Retail Stores
Supermarket
E-commerce

Table of Content

CHAPTER NO. 1 : INTRODUCTION.....		20
1.1.	Report Description	20
	Purpose of the Report	20
	USP & Key Offerings	20
1.2.	Key Benefits for Stakeholders	21
1.3.	Target Audience	21
CHAPTER NO. 2 : EXECUTIVE SUMMARY		22
CHAPTER NO. 3 : INDIA HYGIENE PRODUCT MARKET FORCES & INDUSTRY PULSE.....		24
3.1.	Foundations of Change – Market Overview	24
3.2.	Government Initiatives and Policy Support: Paving the Way for Inclusive Hygiene Access Across Menstrual Health and Baby Diaper Markets	26
3.3.	Rising Demand for Sustainable, Eco-friendly Products and Consumer Awareness	27
3.4.	Channel Expansion & Digital/Direct-to-Consumer (D2C) Growth for Revolutionizing Access, and Consumer Engagement in the Hygiene Products	28
3.5.	Cultural Taboos and Societal Stigma Surrounding Menstruation	30

3.6.	Limited Access in Rural Areas Due to Infrastructure Challenges	31
3.7.	Environmental Concerns and Disposal Challenges	32
3.8.	Untapped Horizons – Growth Potential & Opportunities and Strategic Navigation – Industry Frameworks	34
3.9.	Market Equilibrium – Porter’s Five Forces	36
3.10.	Ecosystem Dynamics – Value Chain Analysis	39
3.11.	Macro Forces – PESTEL Breakdown	41
3.12.	Go-To-Market Strategies	46
3.13.	Key Consumer Trend Analysis	47

CHAPTER NO. 4 : COMPETITION ANALYSIS.....		49
4.1.1.	Company Market Share Analysis.....	49
4.1.2.	India Hygiene Product Market Company Revenue Market Share	49
4.2.	Strategic Developments	51
4.2.1.	Expansion and Certification	51
4.2.2.	New Launch, Partnership and Reacquisition.....	52
4.3.	Competitive Dashboard.....	54
4.4.	Company Assessment Metrics, 2024	55

CHAPTER NO. 5 : INDIA MARKET ANALYSIS, INSIGHTS & FORECAST, BY PRODUCT		57
CHAPTER NO. 6 : INDIA MARKET ANALYSIS, INSIGHTS & FORECAST, BY SALES CHANNEL		62

For Credence Research Inc.

CHAPTER NO. 7 : COMPANY PROFILE66

7.1. Procter & Gamble.....	66	7.6.3. Financial Overview	89
7.1.1. Company Overview	66	7.7. Ginni Filaments Limited	90
7.1.2. Product Portfolio	68	7.7.1. Company Overview	90
7.1.3. Financial Overview	69	7.7.2. Product Portfolio.....	92
7.2. H R Hygiene Pvt. Ltd	70	7.7.3. Financial Overview	93
7.2.1. Company Overview	70	7.8. Wellify (Piramal group)	94
7.2.2. Product Portfolio.....	72	7.8.1. Company Overview	94
7.2.3. Financial Overview	73	7.8.2. Product Portfolio.....	96
7.3. Kimberly-Clark India Pvt Ltd.	74	7.8.3. Financial Overview	97
7.3.1. Company Overview	74	7.9. Sirona 98	
7.3.2. Product Portfolio.....	76	7.9.1. Company Overview	98
7.3.3. Financial Overview	77	7.9.2. Product Portfolio.....	100
7.4. Redcliffe Hygiene Private Limited.....	78	7.10. Nobel Hygiene Private Limited.....	102
7.4.1. Company Overview	78	7.10.1.Company Overview	102
7.4.2. Product Portfolio.....	80	7.10.2.Product Portfolio.....	104
7.5. Unicharm India Private Limited.....	81	7.10.3.Financial Overview	105
7.5.1. Company Overview	81		
7.5.2. Product Portfolio.....	83		
7.5.3. Financial Overview	85		
7.6. JNTL Consumer Health (India) Private Limited (Kenvue).....	86		
7.6.1. Company Overview	86		
7.6.2. Product Portfolio.....	88		

List of Figures

FIG NO. 1. India Hygiene Product Market Revenue Share, By Product, 2024 & 2030.....57

FIG NO. 2. Market Attractiveness Analysis, By Product.....58

FIG NO. 3. Incremental Revenue Growth Opportunity by Product, 2024 - 2030.....59

FIG NO. 4. India Hygiene Product Market Revenue Share, By Sales Channel, 2024 & 2030.....62

FIG NO. 5. Incremental Revenue Growth Opportunity by Sales Channel, 2024 - 203063

FIG NO. 6. Incremental Revenue Growth Opportunity by Sales Channel, 2024 - 203064

List of Tables

TABLE NO. 1.: India Hygiene Product Market Revenue, By Product, 2018 – 2024 (USD Million) 60

TABLE NO. 2.: India Hygiene Product Market Revenue, By Product, 2025 – 2030 (USD Million) 61

TABLE NO. 3.: India Hygiene Product Market Revenue, By Sales Channel, 2018 – 2024 (USD Million) 65

TABLE NO. 4.: India Hygiene Product Market Revenue, By Sales Channel, 2025 – 2030 (USD Million) 65

Chapter No.1: Introduction

1.1. Report Description

Purpose of the Report

The purpose of the strategic research study titled “India Hygiene Product Market - India Industry Perspective Comprehensive Analysis and Forecast 2024 - 2030” is to offer industry investors, company executives, and industry participants with in-depth analysis to enable them make informed strategic decisions related to the opportunities in the industry.

USP & Key Offerings

- Market Size in terms of Revenue (USD Million) from 2018 to 2030
- Historical & Descriptive Analysis from 2018 to 2024
- Forecasts & Predictive Analysis from 2025 to 2030
- Market Drivers, Restraints, Opportunities, & Regional Market Trends
- Market Attractiveness Analysis
- Segment Analysis by Country
- Competitive Landscape and Company Market Share Analysis
- Porter’s Five Forces Analysis
- Value Chain Analysis
- PESTEL Analysis

- Go-To-Market Strategies
- Key Trend Analysis

1.2. Key Benefits for Stakeholders

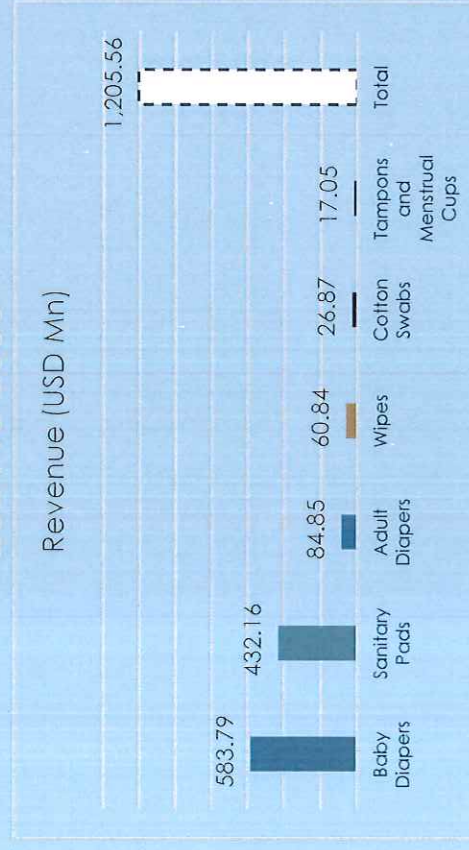
- The report covers forecast and analysis for the Hygiene Product Market on an India level.
- The study provides historic data from 2018 to 2024 along with a forecast from 2025 to 2030 based on revenue (USD Million) to determine the market potential.
- The study includes drivers and restraints of the market along with the impact they have on the demand over the forecast period.
- The report includes the study of potential growth opportunities available in the Hygiene Product Market on an India level.
- Porter's five forces analysis illustrates the degree of competition along with the potency of buyers and suppliers operating in the industry.

1.3. Target Audience

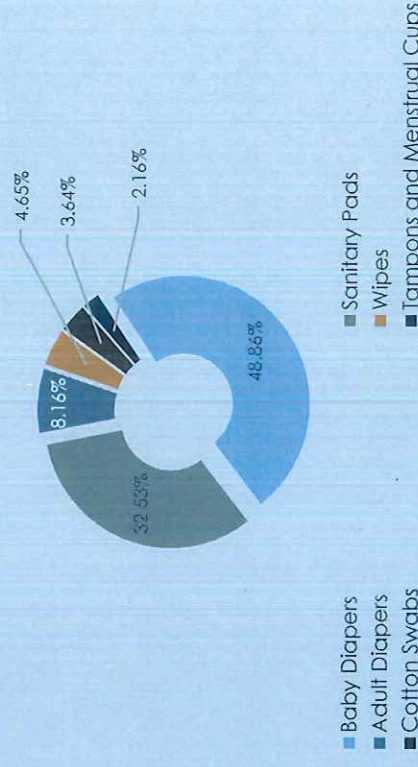
- Industry Investors
- Consultants
- Product Providers
- Manufacturers
- End User

Chapter No. 2 : Executive Summary

Absolute Revenue Growth Opportunities by Product, 2024 to 2030

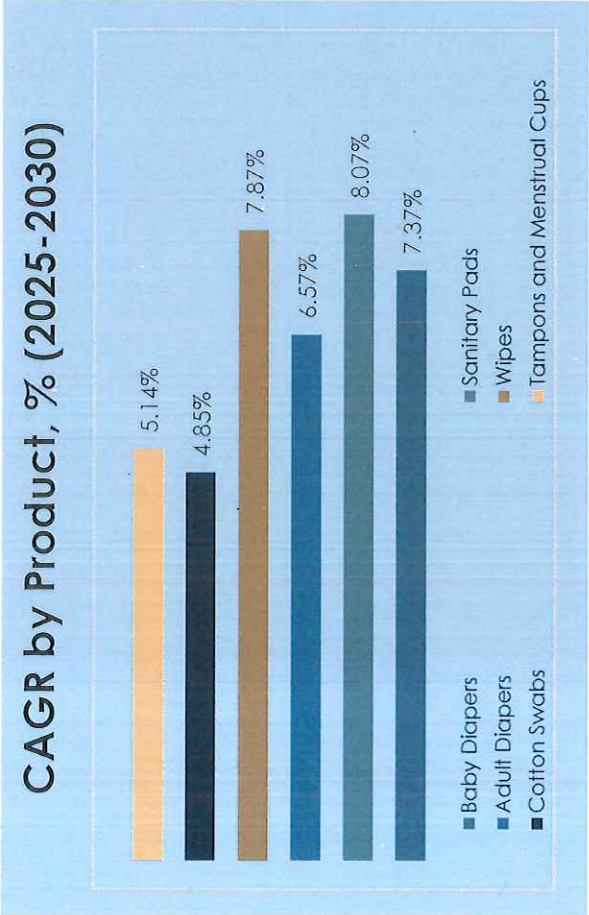


Product wise Market Penetration



In 2024, Baby Diapers dominated the India Hygiene Product Market with a share of 48.86%. This is driven by increasing parental awareness, rising disposable incomes, and a shift toward convenient hygiene solutions, particularly in urban and semi-urban areas. Additionally, expanding product availability through modern retail and e-commerce channels, along with innovations such as rash-free, biodegradable, and ultra-absorbent diapers, have enhanced consumer preference. The continued rise of nuclear families and working mothers has further strengthened diaper usage across the country. Moreover, Sanitary Pads accounted for 32.53% of the market, reflecting their growing adoption across both rural and urban areas.

The segment has benefitted from strong awareness campaigns, government programs, and NGO efforts to promote menstrual hygiene. Sanitary pads remain the most accessible and familiar product for menstruation management, though competition from sustainable alternatives like menstrual cups and reusable pads is slowly gaining traction.



In 2018, the India Hygiene Product Market was valued at USD 1,609.04 million, which grew to USD 2,258.30 million in 2024, reflecting a CAGR of 7.43% during this period. The market's expansion was driven by rising consumer awareness of personal hygiene, increasing disposable incomes, and supportive government initiatives focused on sanitation and menstrual health. A shift in consumer behavior, especially post-pandemic, reinforced the demand for modern hygiene products such as diapers, sanitary pads, wipes, and tampons and menstrual cups, etc.

Looking ahead, the market is projected to expand further, reaching USD 3,463.86 million by 2030. Key growth factors include improved access in rural regions, expanding e-commerce penetration, and rising demand for sustainable and eco-conscious hygiene alternatives. Increasing participation of women in the workforce, evolving lifestyles, and a growing elderly population are also boosting demand across various product categories.

Chapter No. 3: INDIA HYGIENE PRODUCT MARKET FORCES & INDUSTRY PULSE

3.1. Foundations of Change – Market Overview

The India hygiene product market is experiencing robust growth across categories like baby diapers, adult diapers, sanitary pads, wipes, cotton swabs, tampons and menstrual cups, driven by rising health awareness, urbanization, and improved access to affordable hygiene solutions. Increased disposable incomes, growing female workforce participation, and a shift in cultural attitudes have fueled demand, particularly for feminine hygiene products such as sanitary pads, tampons and menstrual cups, where both premium and eco-friendly options are gaining traction. Government initiatives like menstrual hygiene schemes and subsidized product distribution are further boosting rural adoption.

Segments such as baby and adult diapers are expanding rapidly, supported by higher birth rates, aging population, and growing acceptance of incontinence care. Wipes and cotton swabs, though smaller segments, have seen steady demand, especially post-COVID, as consumers prioritize cleanliness and convenience. The rise of D2C brands, improved e-commerce penetration, and regulatory measures like BIS certification for sanitary products are reshaping the market toward quality, safety, and innovation. Regulatory frameworks from bodies like the Bureau of Indian Standards (BIS) are also beginning to enforce quality control more strictly across hygiene categories, especially for items like sanitary napkins and diapers. Overall, India's hygiene product market is evolving into a more organized, inclusive, and opportunity-rich sector.

Momentum Boosters

Growth Triggers



Market Forces & Industry Pulse

Catalysts of Expansion

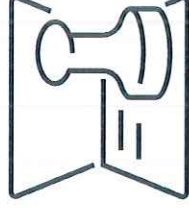


Innovation Fuel

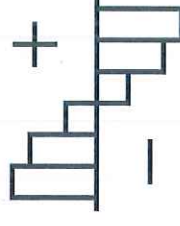
Disruptive Technologies

Regulatory Tides

Compliance Challenges



Market Constraints



Economic Frictions

Inflationary Pressures

3.2.

Government Initiatives and Policy Support: Paving the Way for Inclusive Hygiene Access Across Menstrual Health and Baby Diaper Markets

The Indian government has played a crucial role in transforming the hygiene product market through a series of targeted initiatives and policies designed to improve public health and promote hygiene awareness across the country. One of the most notable programs is the Menstrual Hygiene Scheme (MHS), launched with the objective of providing affordable and accessible sanitary napkins to adolescent girls in schools, particularly in rural and underserved regions. This scheme not only addresses the direct need for menstrual products but also works to improve menstrual health education, thereby reducing stigma and encouraging school attendance among girls. By subsidizing the cost of sanitary pads, the government has made menstrual hygiene more attainable for millions of young women who might otherwise forgo these essential products due to financial constraints.

Building on this foundation, the government introduced the Suvidha brand of sanitary pads, priced at just ₹1 per pad, which has been a significant step towards making menstrual hygiene products affordable on a mass scale. This initiative has particularly benefited rural communities where awareness and access have traditionally been low. The low price point ensures that cost is not a barrier to proper menstrual care, fostering a healthier and more inclusive environment for women and girls across the country. The wide availability of such low-cost sanitary products has played an important role in bridging the urban-rural hygiene gap and empowering women through improved health outcomes.

In addition to menstrual hygiene, government efforts have also begun addressing the hygiene needs of infants by promoting awareness around baby diaper usage and sanitation practices. Although not as heavily subsidized as menstrual products, increasing public health campaigns emphasize the importance of clean and safe diapering to

For Credence Research Inc.

reduce infant infections and skin diseases, particularly in rural and semi-urban areas. Programs focusing on maternal and child health often include hygiene education that encourages caregivers to adopt disposable or cloth diapers that are hygienic and safe. The government's indirect role in facilitating access to affordable baby diapers through improved supply chain support and partnerships with manufacturers has helped stimulate growth in this segment, ensuring that infant hygiene receives greater attention as part of overall public health strategies.

3.3. Rising Demand for Sustainable, Eco-friendly Products and Consumer Awareness

In recent years, consumer awareness regarding the environmental and health impacts of hygiene products has increased significantly, prompting a marked shift toward sustainable and eco-friendly alternatives. This growing consciousness is reshaping the hygiene market in India, especially within key segments such as sanitary pads, baby diapers, wipes, tampons and menstrual cups, where traditional products often rely heavily on plastics and synthetic chemicals that contribute to environmental pollution and pose health concerns. The widespread use of non-biodegradable materials in these products has raised serious questions about their long-term impact on landfills and water systems, accelerating the demand for greener solutions.

Several factors underpin this shift. First, there is rising public awareness of the environmental damage caused by conventional hygiene products, particularly those containing plastic components that take hundreds of years to decompose. Media coverage, social campaigns, and educational efforts by NGOs and government bodies have all contributed to informing consumers about the environmental footprint of their choices. This has led to a growing

preference for biodegradable, compostable, and reusable products made from natural materials such as organic cotton, bamboo fibers, banana fibers, and plant-based biopolymers. For example, biodegradable baby diapers made from natural fibers are increasingly preferred by eco-conscious parents who want to reduce their family's carbon footprint, while compostable wipes are gaining traction as a safer alternative to conventional wet wipes that pollute waterways.

Secondly, health-conscious consumers are increasingly scrutinizing the chemical composition of hygiene products. Concerns about allergies, skin irritation, and prolonged exposure to synthetic chemicals and fragrances have driven demand for products that are chemical-free and gentle on the skin. Organic and natural materials, free from harmful additives, dyes, and perfumes, are gaining prominence as safer alternatives that provide comfort without compromising health. This focus on "clean" products extends across all hygiene categories, including baby diapers and wipes, where parents are opting for gentler options specifically designed for their children's sensitive skin, such as those with hypoallergenic properties and free from chlorine bleaching.

3.4. Channel Expansion & Digital/Direct-to-Consumer (D2C) Growth for Revolutionizing Access, and Consumer Engagement in the Hygiene Products

The expansion of retail channels, particularly through digital platforms, has fundamentally transformed the way hygiene products are accessed and purchased across India. Traditionally dominated by physical retail stores and pharmacies, the hygiene product market has witnessed a rapid shift towards e-commerce and direct-to-consumer (D2C) sales models, significantly enhancing product availability and consumer convenience. Major e-commerce players such as Amazon,

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

Flipkart, and Nykaa, alongside emerging niche platforms, have democratized access to hygiene products, enabling consumers from metropolitan hubs to remote and rural areas to shop with ease. This broader distribution reach has been critical in overcoming geographical barriers and addressing supply chain challenges that historically limited product penetration in less accessible regions.

A key driver in this transformation has been the rise of quick commerce (q-commerce) services, which offer ultra-fast delivery options sometimes within hours, catering to an increasingly convenience-driven consumer base. This immediacy not only enhances customer satisfaction but also builds trust and loyalty, especially for products related to personal health and hygiene where timely availability can be essential. For instance, parents looking for baby diapers or wipes can now order these necessities online and receive them promptly, reducing the risk of running out of crucial supplies. Similarly, menstrual hygiene products are now just a few clicks away, helping eliminate barriers related to privacy, embarrassment, or limited local retail availability.

Complementing the growth of e-commerce is the remarkable surge of Direct-to-Consumer (D2C) brands, which have become game changers in the hygiene product market. Unlike traditional brands that rely heavily on third-party retailers, D2C companies engage directly with their customers, using data-driven strategies to tailor product offerings and marketing efforts. These brands harness the power of digital marketing, social media, and influencer partnerships to build authentic relationships with consumers, especially among younger, urban, and tech-savvy demographics.

3.5. Cultural Taboos and Societal Stigma Surrounding Menstruation

Despite growing awareness campaigns and governmental efforts, cultural taboos and societal stigma around menstruation remain deeply entrenched in many parts of India, especially in rural and semi-urban areas. Menstruation is often regarded as a private, shameful, or even taboo subject, making open conversations about menstrual health rare or socially unacceptable. This stigma creates significant barriers for women and girls when it comes to accessing and using feminine hygiene products such as sanitary pads or tampons. The reluctance to discuss menstrual hygiene publicly results in a lack of awareness and perpetuates misinformation regarding the safety, usage, and importance of hygienic menstrual care.

As a consequence, many women and girls resort to unhygienic alternatives such as old cloth, ashes, sand, or leaves during their menstrual cycles. These practices expose them to a higher risk of infections such as reproductive tract infections (RTIs) and urinary tract infections (UTIs). The World Health Organization estimates that poor menstrual hygiene management (MHM) can increase the risk of infections, which may have long-term health implications, including infertility in extreme cases. According to the Tata Institute of Social Sciences, over ~23% of adolescent girls in Maharashtra reported using old cloth or other unhygienic materials instead of sanitary pads due to cost or stigma, highlighting the persistent barriers in adoption.

Efforts to dismantle these taboos require long-term, grassroots interventions focused on menstrual health education. Programs targeting schools, communities, and families are essential to normalize menstruation as a natural biological process and encourage hygienic practices. For example, government initiatives like the Menstrual Hygiene Scheme and campaigns run by NGOs have been instrumental in raising awareness, but the challenge remains vast, especially in

conservative regions where deep-rooted beliefs prevail. To create meaningful change, education must be coupled with improved product accessibility, community dialogue, and the involvement of men and boys to foster an inclusive environment.

3.6. Limited Access in Rural Areas Due to Infrastructure Challenges

Access to feminine hygiene products in India remains uneven, with rural and remote regions facing significant barriers due to inadequate infrastructure and distribution challenges. While urban centers benefit from well-established retail networks, modern healthcare facilities, and increasing awareness, many rural areas lack the same level of access to essential hygiene products such as sanitary pads, tampons and menstrual cups, baby diapers, and wipes. This disparity is compounded by fragmented supply chains, poor transportation infrastructure, and limited availability of reliable retail outlets.

Furthermore, the challenges of last-mile delivery in geographically difficult areas hinder both traditional retail distribution and e-commerce reach. As a result, consumers in these regions frequently face stockouts or must travel long distances to purchase necessary hygiene items.

The lack of awareness about menstrual hygiene exacerbates the problem. Studies indicate that over 70% of girls in rural India are not informed about menstruation before their first period. This lack of prior knowledge causes confusion, fear, and shame when menstruation begins, often leading to unhygienic practices and poor adoption of sanitary products. Without proper education and support, many girls and women resort to using unhygienic alternatives, which increases

the risk of infections and other health issues. This gap in education is a critical barrier to improving menstrual health outcomes in rural communities.

The challenges are not limited to menstrual hygiene alone. Access to baby diapers and related hygiene products is also constrained in rural areas. Many parents rely on cloth diapers or improvised materials due to affordability and availability issues. However, these alternatives often lack the absorbency and skin-friendly properties of modern disposable diapers, increasing the likelihood of skin rashes and infections in infants. Awareness about the benefits of hygienic baby care products remains low, and distribution channels for premium baby diapers are primarily concentrated in urban markets. This urban-rural divide limits market penetration and leaves a large segment of rural consumers underserved.

3.7. Environmental Concerns and Disposal Challenges

The increasing consumption of disposable hygiene products, particularly sanitary pads and baby diapers, has raised significant environmental concerns in India. Most conventional sanitary products contain plastic components that are non-biodegradable and take up to 500-800 years to decompose. Similarly, disposable baby diapers also contain synthetic materials that contribute heavily to landfill waste. The improper disposal of these products exacerbates the growing problem of environmental pollution, particularly in urban and semi-urban areas where waste management infrastructure is already under strain.

It is estimated that over 121 million menstruating women in India generate approximately 1.8 million tonnes of sanitary waste annually. Of this, only a small fraction is properly collected and treated, with the majority ending up in landfills, open drains, or water bodies. The plastic content in sanitary pads and diapers is a major source of microplastic pollution,

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

which contaminates soil and water and poses risks to human health and wildlife. Additionally, many sanitary products are flushed into toilets or discarded in open areas, clogging sewage systems and creating breeding grounds for disease vectors.

Proper sanitary waste management remains a significant challenge due to inadequate infrastructure and limited awareness. Most municipal bodies lack specialized facilities for treating sanitary waste separately from general waste. Women often dispose of used pads in regular garbage bins, open fields, or water bodies because of the absence of designated disposal systems or due to social stigma around menstrual waste. Studies show that only about 10-15% of Indian households have access to sanitary napkin incinerators or safe disposal mechanisms, leading to widespread environmental contamination. A balanced approach that combines sustainable product development, improved waste management infrastructure, and consumer education is essential to mitigate the environmental impact and ensure long-term sustainability in India's hygiene market.

3.8. Untapped Horizons – Growth Potential & Opportunities and Strategic Navigation – Industry Frameworks

The Indian hygiene product market presents vast untapped growth potential, driven by rising awareness, evolving consumer preferences, and expanding demographic reach. Despite significant progress, a large portion of India's population, particularly in rural and semi-urban regions, remains underserved, creating enormous opportunities for market expansion. Increasing government focus on health and hygiene, coupled with rising disposable incomes and urbanization, is fueling demand for premium and innovative hygiene products across segments like baby diapers, adult diapers, sanitary pads, wipes, cotton swabs, tampons and menstrual cups.

One key opportunity lies in penetrating rural and Tier 2 and Tier 3 cities, where hygiene product adoption is still relatively low due to factors like affordability, lack of awareness, and limited distribution. Tailored product offerings that address affordability without compromising quality, such as low-cost biodegradable sanitary pads or gentle baby wipes can capture these emerging consumer bases. Additionally, increasing literacy and digital penetration enable brands to educate and engage these consumers through digital marketing and e-commerce platforms, making previously inaccessible markets reachable.

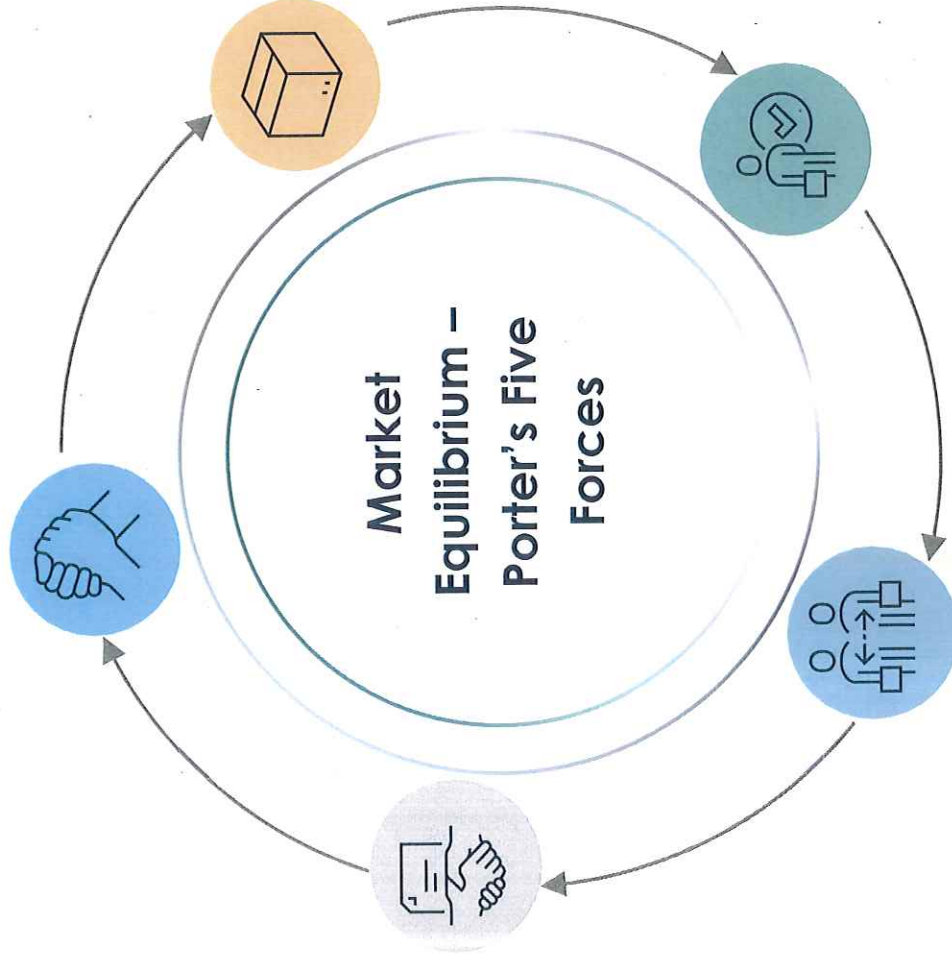
The burgeoning Direct-to-Consumer (D2C) model and digital commerce are revolutionizing market dynamics by providing personalized experiences, subscription models, and convenience. This shift enables brands to build direct relationships with consumers, gather real-time feedback, and rapidly innovate products. It also reduces dependency on traditional retail and improves access in remote regions via e-commerce logistics. Collaborations with influencers and social campaigns further amplify brand reach and trust.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

Strategically navigating this growth requires a robust industry framework that balances innovation, regulation, and consumer engagement. Industry stakeholders must align with evolving government policies on product safety, biodegradable standards, and sanitary waste management. Compliance with these frameworks not only mitigates legal risks but also builds consumer confidence. Furthermore, partnerships between manufacturers, NGOs, and government programs can facilitate awareness campaigns, improve product distribution, and enhance menstrual hygiene management at the grassroots level.

In summary, the Indian hygiene product industry stands at the cusp of substantial growth fueled by untapped markets, sustainability trends, and digital transformation. Companies that strategically leverage these opportunities—through affordable innovation, sustainable practices, expanded distribution, and strong regulatory compliance—are well positioned to lead the next phase of market expansion and social impact.

3.9. Market Equilibrium – Porter's Five Forces



Competitive Rivalry	• Many global and local brands compete • Heavy focus on branding, pricing, and distribution • Fast-growing D2C players increasing rivalry • Urban market saturation in some segments
Supplier Power	• Raw material dependence on imports • Growing domestic sourcing balances power • Sustainable product manufacturers face higher input costs and limited suppliers
New Entrants Threat	• Easy entry in commodity segments • Harder for premium/niche players due to certification and trust issues • D2C and online platforms enabling faster entry
Substitute Threat	• Cloth, water, or homemade solutions still used • Menstrual cups and reusable diapers growing • In high-risk or formal sectors, substitutes are not viable
Buyer Power	• Urban consumers have wide options and low switching costs • Government and NGOs exert pricing pressure in bulk procurement • Rural consumers still price-sensitive; awareness influences decisions

Competitive Rivalry – High

The Indian hygiene product market is highly competitive, with both global players like P&G, Unicharm, and Kimberly-Clark, and local brands such as Nobel Hygiene and Redcliffe Hygiene Private Limited vying for market share. Product categories like sanitary pads, diapers, and wipes are saturated with similar offerings, making it hard to differentiate beyond price, comfort, and branding. The rise of D2C brands has further intensified competition, especially in urban areas where brand switching is common due to low switching costs. Innovation in sustainable and organic products, aggressive advertising, and strategic pricing are essential for brands to retain customer loyalty in this crowded space.

Supplier Power – Low to Moderate

Most hygiene products rely on widely available raw materials like SAP, fluff pulp, cotton, and plastic, which limits supplier influence. However, reliance on imports for certain key inputs, especially for high-quality or biodegradable materials, can increase costs and reduce bargaining power. For companies producing eco-friendly products, fewer certified suppliers exist, giving them slightly more leverage. Still, as local sourcing expands under government initiatives, supplier power is expected to decline over time.

Threat of New Entrants – Moderate

Barriers to entry are relatively low in commodity segments like cotton swabs and low-cost sanitary pads. However, entering premium or regulated segments, such as biodegradable products or hospital-grade adult diapers, requires significant investment in R&D, certifications, and trust-building. The D2C model has made it easier for startups to reach customers directly, but establishing consistent product quality and brand credibility remains a challenge.

Threat of Substitutes – Moderate

In lower-income and rural areas, traditional alternatives like cloth, ash, or washable nappies still act as substitutes to modern hygiene products due to affordability or cultural norms. Additionally, reusable products like menstrual cups and cloth diapers are gaining popularity among eco-conscious urban users. However, growing awareness of hygiene-related health risks, combined with government programs promoting modern hygiene products, is slowly reducing the prevalence of these substitutes.

Buyer Power – Moderate to High

Buyer power in the Indian hygiene market is generally moderate but becomes high in certain consumer groups and procurement contexts. On the individual level, especially in urban India, consumers have access to a wide array of brands, formats, and pricing options across both offline and online channels. This choice, combined with low switching costs, increases buyer power significantly. Consumers, particularly millennial parents, young women, and health-conscious urbanites are becoming more discerning and expect high quality, skin-friendly, and in some cases, environmentally responsible products.

3.10. Ecosystem Dynamics – Value Chain Analysis



Raw Material Sourcing & Innovation	Product Design & Manufacturing Process	Plant Setup, Commissioning & Compliance	Product Applications & End-Use Segments	Recycling, Waste Management & Sustainability
Superabsorbent polymers (SAP), fluff pulp, nonwoven fabrics, polyethylene films, adhesives, bamboo fibers, and organic cotton are sourced both locally and internationally. While India still imports high-grade SAP for baby and adult diapers, growing R&D explores biodegradable inputs for sanitary pads, tampons and menstrual cups, and wipes.	Sanitary pads, baby and adult diapers, wipes, and tampons and menstrual cups are designed for optimal absorbency, comfort, and skin-friendliness. Manufacturing uses ultrasonic sealing, hot-melt adhesives, and breathable layers. Reusable and eco-friendly variants are increasingly popular.	Facilities in Gujarat, Maharashtra, Tamil Nadu, and Haryana integrate automated lines and quality control systems. Certifications like BIS (e.g., IS 5405 for sanitary pads), ISO, and dermatological approvals are essential. Hygiene training is built into pre-commissioning.	Key segments include baby diapers and wipes, adult incontinence products, sanitary pads tampons and menstrual cups, and personal care items like cotton swabs. Usage spans households, hospitals, schools, and NGOs. Demand is driven by affordability in rural areas and premium health-conscious choices in urban markets.	India generates over 12 billion sanitary pads annually, most non-biodegradable. The market is shifting toward compostable diapers, reusable cloth pads, biodegradable wipes, and menstrual cups. Packaging innovation and waste-segregation compliance are gaining importance.
Domestic sourcing is being prioritized for banana fiber, corn-starch, and bamboo to reduce import dependence and environmental impact. Organic cotton and	Automated machinery improves consistency and lowers defect rates. Products are optimized for regional needs cost-effective in rural areas, premium and skin-sensitive	Plants adopt modular designs and IoT-enabled monitoring. Before launch, manufacturers conduct regulatory audits, lab testing (pH, absorption, skin safety), and sample	Products reach end-users through modern retail, e-commerce, and direct-to-consumer (D2C) brands. Menstrual hygiene kits are distributed via government schemes, while adult	Companies are piloting take-back schemes for diapers and sanitary pads, community composting projects, and refillable packaging, especially in wipes and tampons.

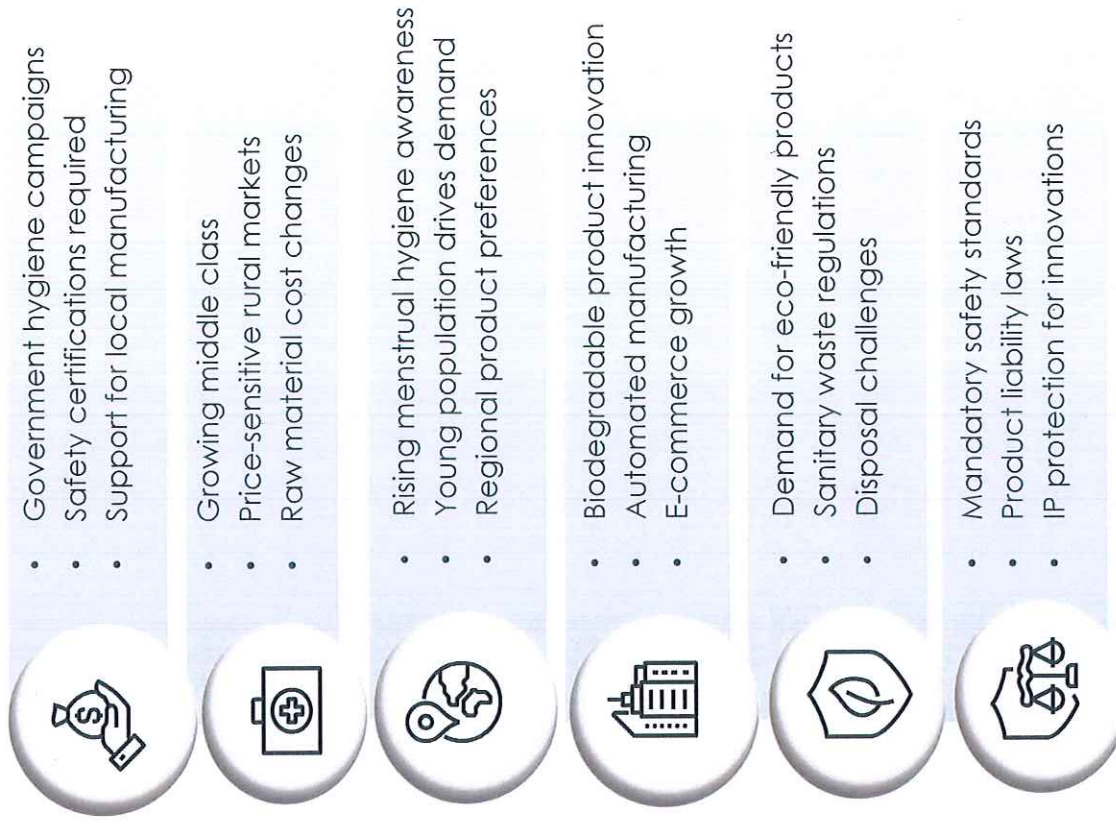
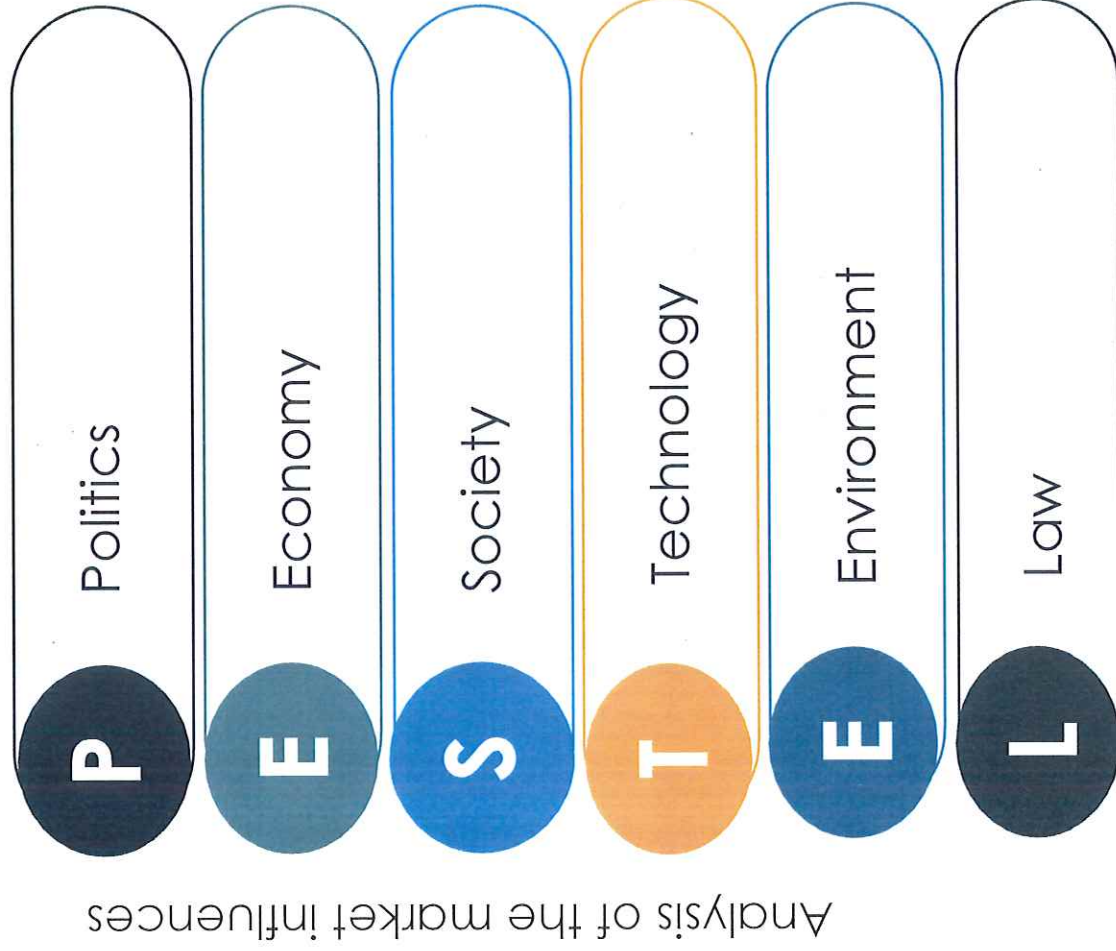
INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

biodegradable SAPs are gaining traction, especially in baby diapers and tampons and menstrual cups.	in urban markets. Ventilation and emission controls are critical for infant care and intimate products.	batches. Worker hygiene protocols are mandatory.	diapers are seeing growth due to aging demographics.	Startups and social enterprises lead sustainable innovation.
Fluctuating prices of SAP and pulp impact cost structures across baby/adult diapers and wipes. Sourcing high-quality, non-toxic materials is crucial for skin-sensitive products. Supply disruptions still affect consistency.	Product innovation includes breathable barriers, biodegradable SAPs, anti-bacterial layers (in wipes and pads), and organic top-sheets in tampons. Customization by geography helps balance cost and comfort.	Regulatory compliance includes BIS standards, toxicity testing, pH balance, and labeling norms. Safe disposal units are being installed at production plants. Workforce upskilling is essential to meet hygiene and safety benchmarks.	Urban consumers prefer chemical-free, organic hygiene products; rural markets prioritize affordability and accessibility. Institutional buyers like hospitals demand standardized, certified products.	New EPR (Extended Producer Responsibility) frameworks are being introduced for sanitary and diaper waste. Awareness campaigns on menstrual and diaper waste disposal are expanding via NGOs and public health programs.

The value chain of the India hygiene product market spans from raw material sourcing to sustainable end-use solutions. Key materials like SAP, fluff pulp, nonwovens, and natural fibers (e.g., bamboo, organic cotton) are sourced both locally and internationally, with growing focus on biodegradable alternatives. Manufacturers use advanced production methods like ultrasonic sealing and precision layering to develop sanitary pads, baby/adult diapers, wipes, tampons and menstrual cups, and swabs that meet BIS and international safety standards.

Demand is driven by diverse consumer segments from infants and women to the elderly and institutional buyers across both rural and urban India. Government schemes, rising awareness, and D2C brands are further expanding access. Sustainability is a growing priority, with companies investing in compostable products, eco-packaging, and waste management innovations to address the massive environmental burden of sanitary and diaper waste.

3.11. Macro Forces – PESTEL Breakdown



Political Factors

- Strengthening Health and Sanitation Policies

The Indian government's focus on improving public health through programs like Swachh Bharat Mission and Menstrual Hygiene Scheme drives demand for hygiene products such as sanitary pads and wipes, especially in rural areas.

- Regulatory Frameworks on Product Safety and Standards

Bureau of Indian Standards (BIS) certifications and Food Safety and Standards Authority of India (FSSAI) regulations ensure product quality and safety, impacting manufacturing and market entry.

- Increased Government Support and Subsidies

Subsidies and incentives under schemes like Make in India and PLI (Production Linked Incentive) encourage domestic manufacturing of hygiene products, reducing import dependence.

Economic Factors

- Growing Middle-Class and Rising Disposable Income

Economic growth and urbanization boost purchasing power, expanding demand for premium and organic hygiene products such as tampons and menstrual cups, baby and adult diapers.

- Cost Sensitivity and Price Competition

While urban consumers may opt for premium products, rural and low-income segments drive demand for affordable sanitary pads and wipes, influencing pricing strategies.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

- Raw Material Price Volatility

Fluctuations in the cost of SAP, pulp, nonwoven fabrics, and packaging materials affect manufacturing costs and product pricing.

Social Factors

- Increasing Awareness and Changing Attitudes toward Hygiene

Improved education and campaigns have reduced stigma around menstruation, boosting adoption of sanitary products, tampons, and menstrual cups.

- Demographic Dividend and Urban Migration

A large young population and growing urban workforce increase demand for baby diapers, adult incontinence products, and personal hygiene wipes.

- Cultural Diversity and Regional Preferences

Product customization for regional preferences (e.g., pad thickness, absorbency) is essential to address diverse consumer needs across India.

Technological Factors

- Advances in Material Science and Product Innovation

Development of biodegradable SAP, organic cotton pads, flushable wipes, and reusable menstrual products is gaining traction, catering to eco-conscious consumers.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

- Automation and Smart Manufacturing

Modern plants integrate robotics, IoT, and real-time quality control to improve efficiency and product consistency.

- Digital Marketing and E-commerce Expansion

Online platforms enable wider reach, especially for niche and premium hygiene brands, while social media drives awareness and consumer education.

Environmental Factors

- Rising Focus on Sustainability and Waste Reduction

Growing environmental concerns push manufacturers to develop compostable sanitary products, reusable diapers, and eco-friendly packaging solutions.

- Government Initiatives on Waste Management

Policies encouraging Extended Producer Responsibility (EPR) and sanitary waste segregation are shaping industry practices.

- Challenges of Sanitary Waste Disposal

Large volumes of non-biodegradable waste from hygiene products pose environmental hazards, prompting startups and NGOs to innovate in recycling and composting.

Legal Factors

- Strict Product Quality and Safety Standards

Compliance with BIS standards (e.g., IS 5405 for sanitary pads) and regulations on chemical safety, allergen testing, and labeling is mandatory.

- Liability and Consumer Protection Laws

Manufacturers and sellers face legal consequences for defective or unsafe products, making compliance critical.

- Intellectual Property and Brand Protection

Companies secure patents on innovative product designs and formulations to maintain competitive advantage in a crowded market.

3.12. Go-To-Market Strategies

The Indian hygiene market offers significant growth potential, especially in diapers and sanitary pads, as rising disposable incomes, urbanization, and health awareness drive demand.

For **diapers**, urban parents form the premium segment, valuing comfort, safety, and convenience, while semi-urban and rural households represent a large untapped base that can be reached through affordable packs and awareness programs.

For **sanitary pads**, the urban market is evolving toward eco-friendly and premium products, while rural and semi-urban women need accessible, low-cost options supported by education campaigns to break cultural stigma. For Instance, initiative adopted by the P&G through Whisper menstrual hygiene education programme, the company reached over 2 corer girls in the last 3 year.

From a Marketing Standpoint

Dual positioning works best: premium, innovation-driven branding for urban consumers, and affordability with education for rural markets. Moreover, affordability & smaller pack sizes for wider reach. Demand is growing for smaller, value-pack SKUs which are more affordable per purchase (even if the cost per unit is higher).

Digital marketing influencers, parenting and women's health content, social media campaigns is effective for urban buyers.

On-ground Activations Anganwadi and ASHA worker outreach, school workshops, community events, and regional media are critical for rural penetration. Hospital partnerships, doctor endorsements, and institutional tie-ups enhance credibility, while collaborations with NGOs and government schemes expand rural access.

Strong marketing opportunities also lie in **subscription models** (monthly packs via e-commerce), trial-based promotions (free samples, low-cost starter packs), and **cause-driven campaigns** that align with women's empowerment and

hygiene awareness. Differentiation through **eco-friendly, rash-free, and biodegradable lines** can strengthen brand value among conscious consumers.

Overall, the marketing prospect in India is highly favorable provided brands balance aspirational urban branding with grassroots awareness and affordability strategies to tap into both mature and underpenetrated markets.

3.13. Key Consumer Trend Analysis

In India, consumer behavior around hygiene products such as baby diapers, adult diapers, sanitary pads, tampons and menstrual cups and wipes is evolving rapidly. Rising awareness of health and hygiene, especially among younger parents and women, is driving greater acceptance of disposable products over traditional cloth-based alternatives. Baby diapers are increasingly seen as essential in urban households, where working parents prioritize convenience and comfort, while adult diapers are slowly gaining acceptance as conversations around elderly care, post-surgery needs, and incontinence become less stigmatized. For women's hygiene, sanitary pads dominate, though tampons and menstrual cups remain niche and are mostly adopted in urban, educated segments due to ongoing taboos and limited awareness. Consumers across categories are seeking better quality rash-free, breathable, skin-friendly, and discreet products alongside innovation such as pull-up pants, odor control, and biodegradable or eco-friendly alternatives. At the same time, affordability continues to shape purchase decisions, with smaller, low-cost pack sizes playing a crucial role in semi-urban and rural markets.

Digital adoption is changing buying behavior as well, with e-commerce and quick-commerce platforms providing convenience, privacy, and subscription options, particularly for adult hygiene and premium women's products. In rural areas, however, kirana stores, chemists, and community outreach remain the most influential touchpoints. Increasingly, sustainability and environmental concerns are entering consumer conversations, especially among urban millennials and Gen Z, leading to interest in biodegradable diapers, eco-friendly sanitary pads, and chemical-free wipes.

The brief summary pointers:

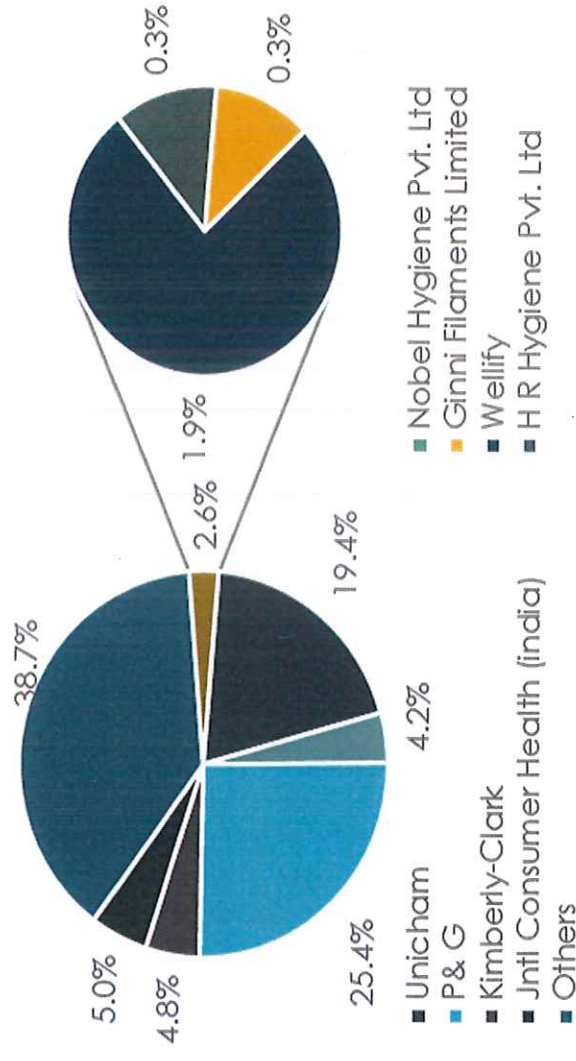
- **Demographic & Health Drivers:** India has a large young population (high birth rates) which fuels demand for baby diapers. Young, working parents are increasingly choosing disposable over cloth
- **Rising Hygiene & Health Awareness:** Public health campaigns (e.g., Swachh Bharat) and government / NGO initiatives are helping reduce stigma around menstrual hygiene and adult incontinence. This supports greater acceptance and usage.
- **Premiumization & Product Innovation:** There is demand for improved features: better absorbency, odor control, skin-friendly materials, breathable fabrics, slim designs, pull-on pants, wetness indicators. Eco-friendly / biodegradable products are gaining traction, especially among urban & environmentally conscious consumers.
- **Online & Omni-Channel Buying Behavior:** E-commerce is becoming an important channel due to convenience, wider variety, discounts, home delivery, and discreet purchase. Traditional retail (pharmacies, kirana stores, supermarkets) still play a major role, especially in semi-urban and rural areas, but their role is evolving with modern trade and digital integration.

Overall, India's hygiene product consumers are shifting toward a blend of **convenience, comfort, affordability, and eco-consciousness**, with clear differences between urban premium buyers and rural mass-market adopters.

Chapter No. 4 : COMPETITION ANALYSIS

- 4.1.1. Company Market Share Analysis
- 4.1.2. India Hygiene Product Market Company Revenue Market Share

MARKET COMMANDERS – SHARE ANALYSIS BY PLAYERS, 2024



INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

Company Name	Segmental Revenue in USD Mn, 2024	Market Share % in 2024
Unicharm India Private Limited	438.06	19.39%
Nobel Hygiene Private Limited	94.30	4.18%
Procter & Gamble	574.00	25.41%
Ginni Filaments Limited	6.70	0.30%
Kimberly-Clark India Pvt Ltd.	108.00	4.78%
Wellify (Piramal group)	44.00	1.95%
JNTL Consumer Health (India) Private Limited (Kenvue)	113.40	5.02%
H R Hygiene Pvt. Ltd	7.00	0.31%
Others	873.20	38.66%
Total	2,258.66	100.00%

4.2. Strategic Developments

4.2.1. Expansion and Certification

Expansion and Certification		Number of Expansion and Certification during recent years
May 2025	Expansion	Amazon targeted 2 lakh women through an expanded menstrual hygiene drive by 2025. The sanitary napkin production units had a combined production capacity of 1,200 biodegradable sanitary napkins per hour.
April 2024	Certification	BIS Made Certification Mandatory for Sanitary Pads & Baby Diapers. Bureau of Indian Standards (BIS) set to bring sanitary napkins and baby diapers under its ambit of mandatory certification.
January 2023	Expansion	Unicharm's MamyPoko brand has outpaced Procter & Gamble's Pampers to become India's leading diaper brand by sales in the fiscal year 2023.
August 2023	Expansion	Kenvue, Inc. officially became a fully independent company, finalizing its separation from Johnson & Johnson.

September 2022	Expansion	Johnson & Johnson took another step forward in establishing two independent, market-leading companies with the announcement of Kenvue as the name for the planned New Consumer Health Company.
----------------	-----------	--

4.2.2. New Launch, Partnership and Reacquisition

New Launch, Partnership and Reacquisition

Number of New Launch, Partnership and Reacquisition during recent years

February 2025	Reacquisition	Sirona Cofounders Reacquired Brand from Good Glamm in ₹150 Crore Deal. Deep and Mohit Bajaj finalized the buyback of Sirona from the Good Glamm Group.
May 2024	New Launch	Huggies announced a pioneering innovation aimed at tackling diaper rash. The new product line, Huggies Skin Essentials, is designed with the child's skin in mind, offering enhanced protection and comfort.
March 2024	Partnership	Huggies, through the Kimberly-Clark Foundation, partnered with Baby2Baby to provide millions of diapers and wipes to mothers in need.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

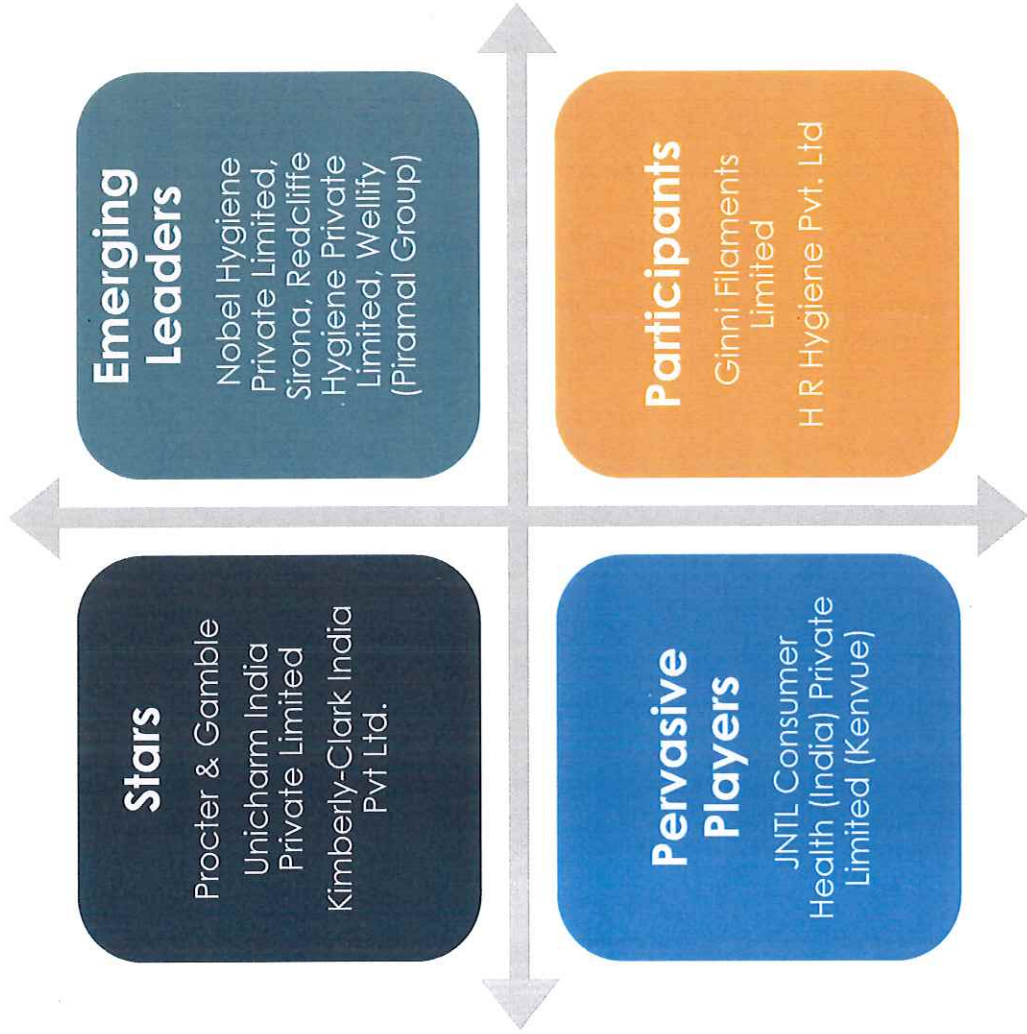
November 2022	New Launch	Piramal Pharma Limited (PPL), under its Consumer Products Division (CPD), has launched Wellify.in, a direct-to-consumer (D2C) platform aimed at providing consumers with a comprehensive range of health and wellness products.
March 2022	New Launch	Nobel Hygiene launched a digital campaign highlighting the "Susu Meter" wetness indicator on its Snuggly Gold Pant-Style Diapers.

4.3. Competitive Dashboard

Key Players	Unicharm India Private Limited	Procter & Gamble	Nobel Hygiene Private Limited	Kimberly-Clark India Pvt Ltd.	JNTL Consumer Health (India) Private Limited (Kenvue)
	438.06	574.00	94.30	108.00	113.40
Segmental Revenue (In Mn, 2024)					
Est. India Market Share in 2024	19.39%	25.41%	4.18%	4.78%	5.02%
Portfolio Strength					
Maturity in Product Type Market	Strong in baby and adult diaper categories; brands like MamyPoko command major rural and urban share	Dominant in sanitary pads (Whisper) and growing in baby care (Pampers); deep market penetration	India's leading adult diaper brand (Friends); also strong in baby diapers	Strong in baby diapers (Huggies); niche but premium focus in India	Focused on feminine hygiene (Stayfree) and cotton swabs (Johnson's); heritage brand with deep trust
Preferred Strategies	Mass-market reach, rural expansion, price-pack innovations, high distribution strength	Premium & mass segmentation, heavy advertising, school outreach for menstrual awareness	Niche focus in adult care; affordable pricing, D2C expansion, caregiver education	Premium positioning, wellness messaging, innovation in comfort fit	Brand legacy + doctor-recommended trust; school campaigns, eco-skewed product lines
Analysts View	Consistent performer with strong rural and Tier-2/3 focus; deep brand loyalty in diapers	Category leader with massive brand pull and aggressive ad spends; wide demographic reach	Specialized player owning adult care segment; poised for expansion across eldercare channels	High brand value in baby care; needs stronger local adaptation for mass scaling	Legacy brand modernizing portfolio; steady player in sanitary pads, growing interest in sustainability



4.4. Company Assessment Metrics, 2024



Stars: Stars are companies that have demonstrated high growth rates and strong financial performance.

Emerging Leaders: Emerging leaders are companies with the potential to become stars in the future. They are often characterized by rapid growth and innovative products.

Pervasive Players: Pervasive players are companies that have a significant presence in the market but may not have high growth rates compared to stars and emerging leaders.

Participants: Participants are companies that are actively present in the market but may have limited market share and growth compared to other categories.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

The India Hygiene Product Market is led by established multinationals like Procter & Gamble, Unicharm India Private Limited, and Kimberly-Clark India Pvt Ltd, who stand out as clear “stars” in the industry. With vast product portfolios spanning baby diapers, sanitary pads, and wipes, they dominate both urban and semi-urban markets through strong distribution networks, trusted brands, and continuous innovation. Their ability to scale, invest in R&D, and adapt to sustainability trends reinforces their leadership across categories.

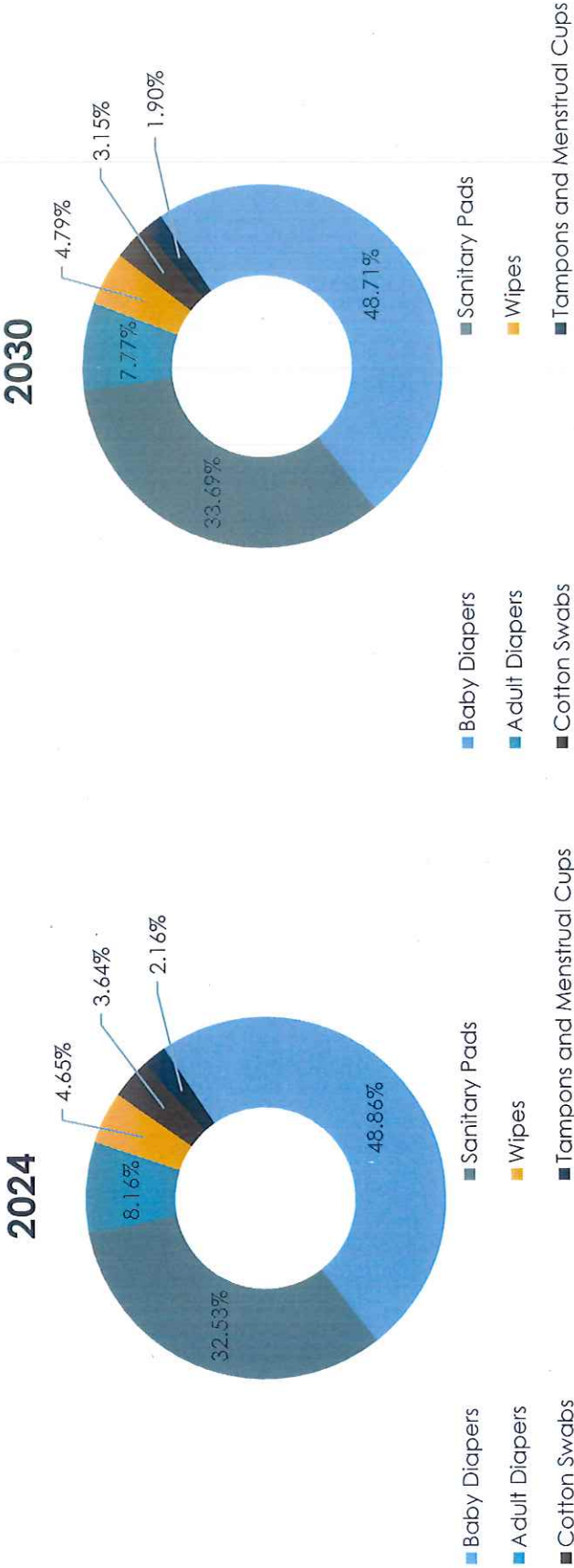
Companies like Nobel Hygiene, Sirona, Wellify (Piramal Group), and Redcliffe Hygiene Private Limited are “emerging leaders”, they are rapidly growing, gaining market share through premium and sustainable offerings, digital-first approaches, and product differentiation, especially in adult diapers and eco-friendly menstrual hygiene solutions. JNTL Consumer Health (India) Private Limited (Kenvue) remains a “pervasive player”, with strong brand equity and stable demand, particularly in feminine hygiene, but comparatively lower market aggression.

Meanwhile, Ginni Filaments Limited and H R Hygiene Pvt. Ltd act as “participants”, currently present and active in select product lines with niche consumer bases. While their market scale and visibility are relatively modest compared to larger players, both companies have laid foundations for future growth. H R Hygiene Pvt. Ltd is exploring affordable menstrual hygiene solutions aimed at semi-urban and rural markets, backed by low-cost manufacturing and increasing focus on product quality and reach. As affordability, sustainability, and localized innovation become key drivers, these companies have the opportunity to scale and strengthen their positions in India's rapidly evolving hygiene market.

Chapter No. 5 : India Market Analysis, Insights & Forecast, by Product

FIG NO. 1.

India Hygiene Product Market Revenue Share, By Product, 2024 & 2030



2024

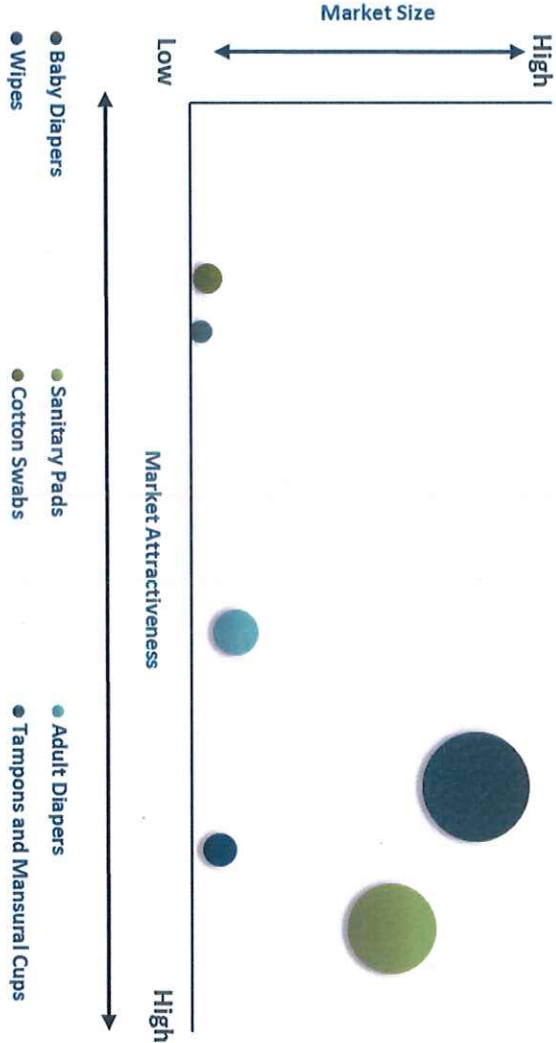
Baby Diapers accounted for the largest share of 48.86% in the hygiene product market in 2024. The demand was driven by India's large infant population, growing disposable income, and increasing awareness of hygiene among new parents.

2030

Baby Diapers are projected to maintain the largest market share of 48.71% by 2030. Growth is expected to continue as diaper usage penetrates rural and tier 3 markets, supported by improved distribution networks and government initiatives promoting hygiene.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

FIG NO. 2. Market Attractiveness Analysis, By Product

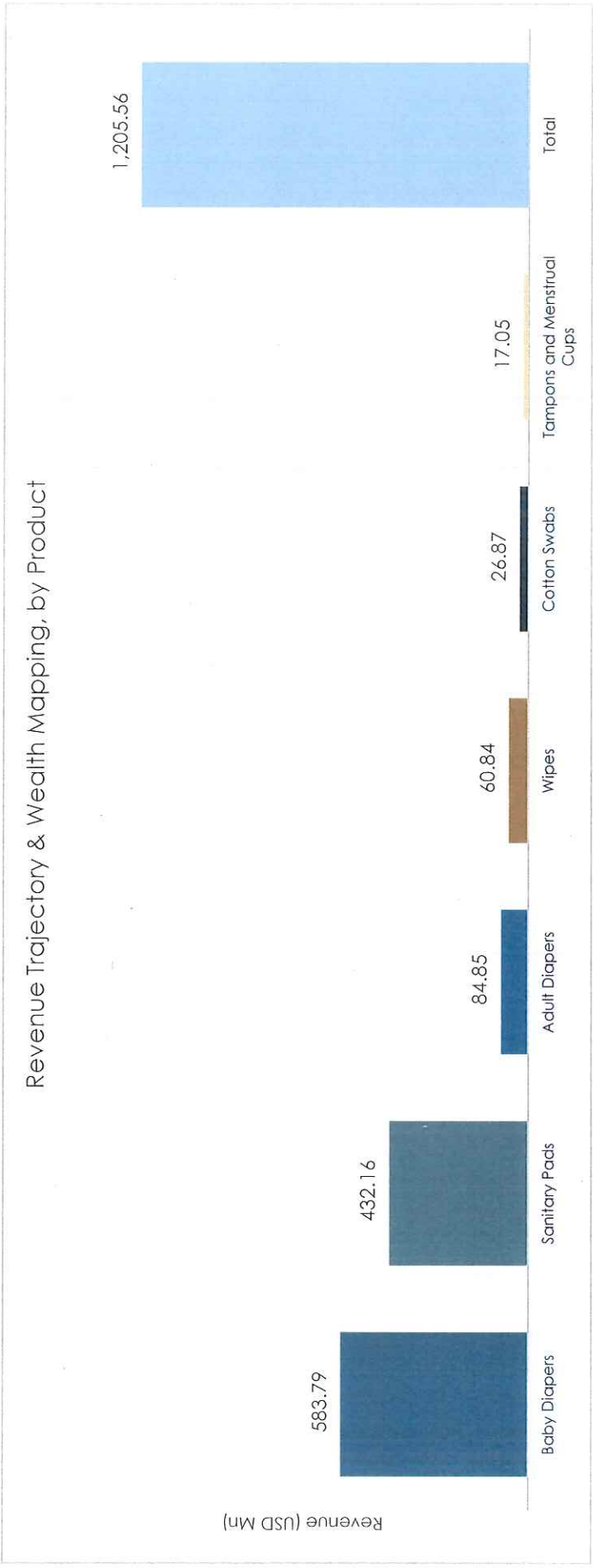


Baby Diapers dominate the hygiene product market with the largest market size, supported by strong and consistent demand from India's large infant population and increasing parental focus on hygiene and convenience. Their widespread acceptance, particularly in urban and semi-urban areas, reinforces their leadership.

Sanitary Pads also represent a significant portion of the market, driven by rising awareness of menstrual hygiene and expanding access across rural and lower-income populations. Supported by government initiatives, school programs, and NGO campaigns, this segment continues to grow rapidly.

Adult Diapers hold a smaller share of the market but are steadily gaining traction, reflecting India's aging population and growing attention to elderly care and incontinence solutions. Adoption is gradually increasing among both institutional and individual users, but social stigma and limited awareness still pose challenges.

FIG NO. 3. Incremental Revenue Growth Opportunity by Product, 2024 - 2030



INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

TABLE NO. 1.: India Hygiene Product Market Revenue, By Product, 2018 – 2024 (USD Million)

Product	2018	2019	2020	2021	2022	2023	2024
Baby Diapers	798.62	798.62	849.60	901.91	961.52	1,028.37	1,103.40
Sanitary Pads	502.51	502.51	540.92	582.93	628.94	679.37	734.70
Adult Diapers	137.97	137.97	146.15	154.17	163.14	173.19	184.30
Wipes	67.29	67.29	73.70	80.64	88.15	96.25	105.00
Cotton Swabs	65.03	65.03	68.10	71.34	74.76	78.37	82.20
Tampons and Menstrual Cups	37.62	37.62	39.60	41.69	43.90	46.24	48.70
Total	1,609.04	1,609.04	1,718.06	1,832.68	1,960.41	2,101.79	2,258.30

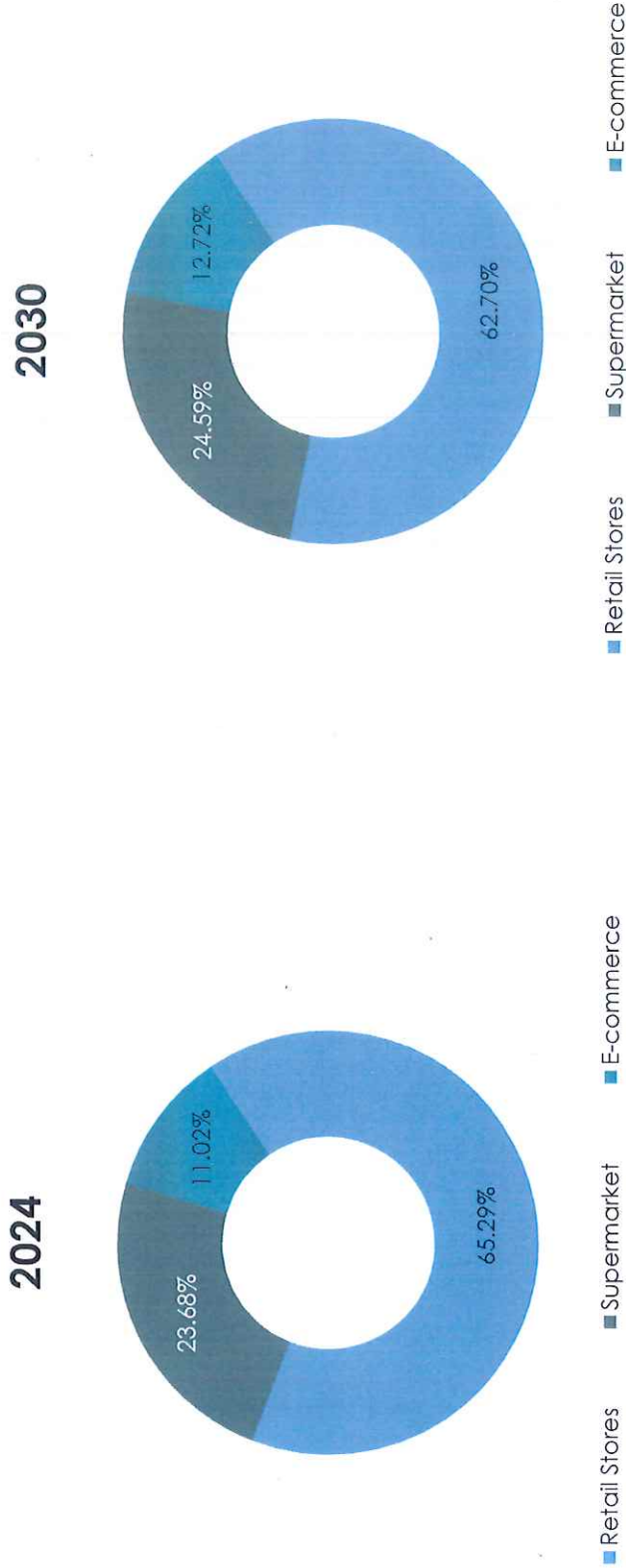
INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

TABLE NO. 2.: India Hygiene Product Market Revenue, By Product, 2025 – 2030 (USD Million)

Product	2025	2026	2027	2028	2029	2030	CAGR
Baby Diapers	1,182.09	1,267.34	1,359.78	1,460.06	1,568.93	1,687.19	7.37%
Sanitary Pads	791.61	853.78	921.76	996.14	1,077.59	1,166.86	8.07%
Adult Diapers	195.81	208.25	221.71	236.27	252.05	269.15	6.57%
Wipes	113.55	122.70	132.47	142.89	154.00	165.84	7.87%
Cotton Swabs	86.09	90.19	94.53	99.11	103.95	109.07	4.85%
Tampons and Menstrual Cups	51.18	53.79	56.55	59.46	62.52	65.75	5.14%
Total	2,420.33	2,596.07	2,786.80	2,993.93	3,219.05	3,463.86	7.43%

Chapter No. 6 : India Market Analysis, Insights & Forecast, by Sales Channel

FIG NO. 4. India Hygiene Product Market Revenue Share, By Sales Channel, 2024 & 2030



2024

Retail Stores accounted for 65.29% of hygiene product sales in 2024. Modern trade formats like supermarkets, hypermarkets, and pharmacies were crucial in urban regions, offering wide brand availability and in-store promotions.

2030

Retail Stores are expected to contribute 62.70% to hygiene product distribution by 2030. Retail infrastructure is projected to expand significantly into rural and tier 3 areas, powered by better logistics and tech-enabled inventory systems.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

FIG NO. 5. Incremental Revenue Growth Opportunity by Sales Channel, 2024 - 2030

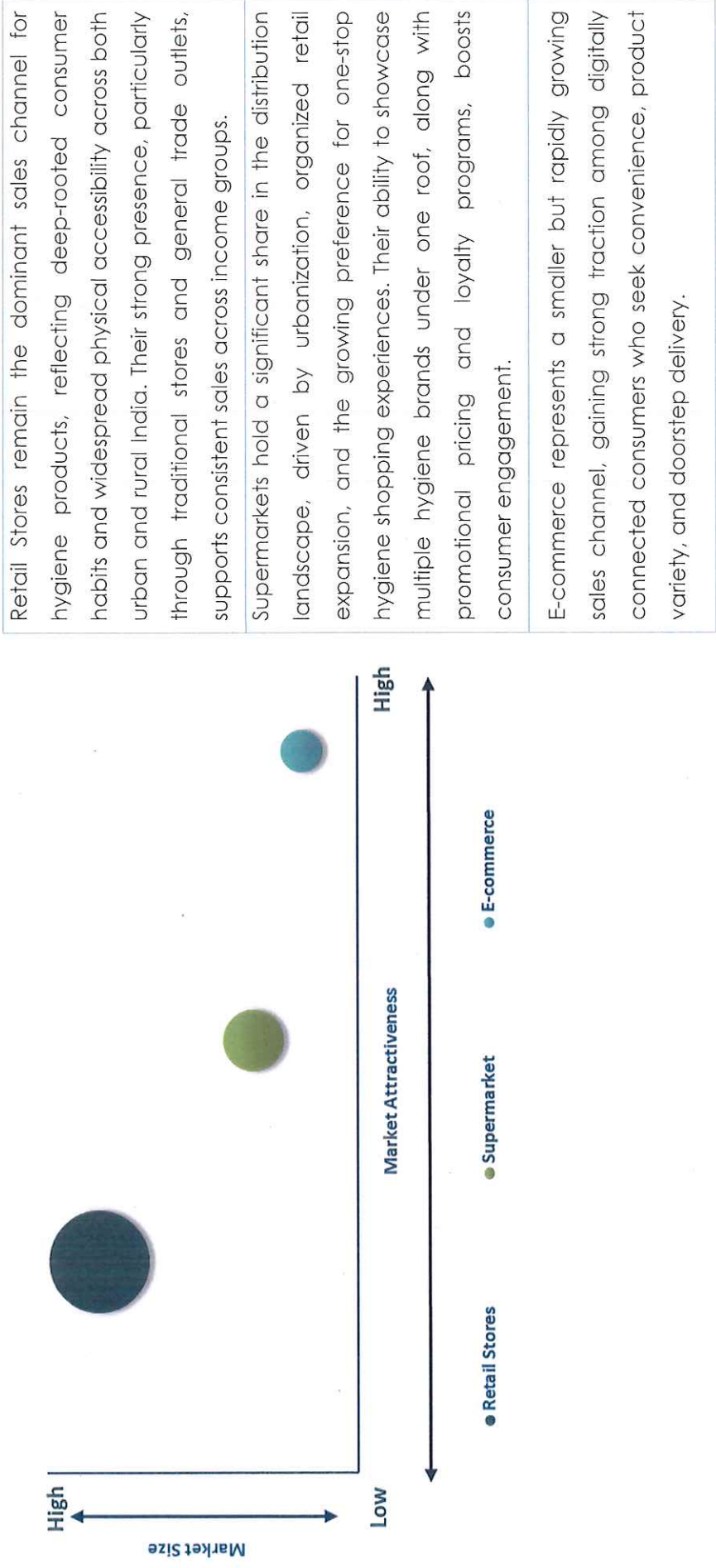
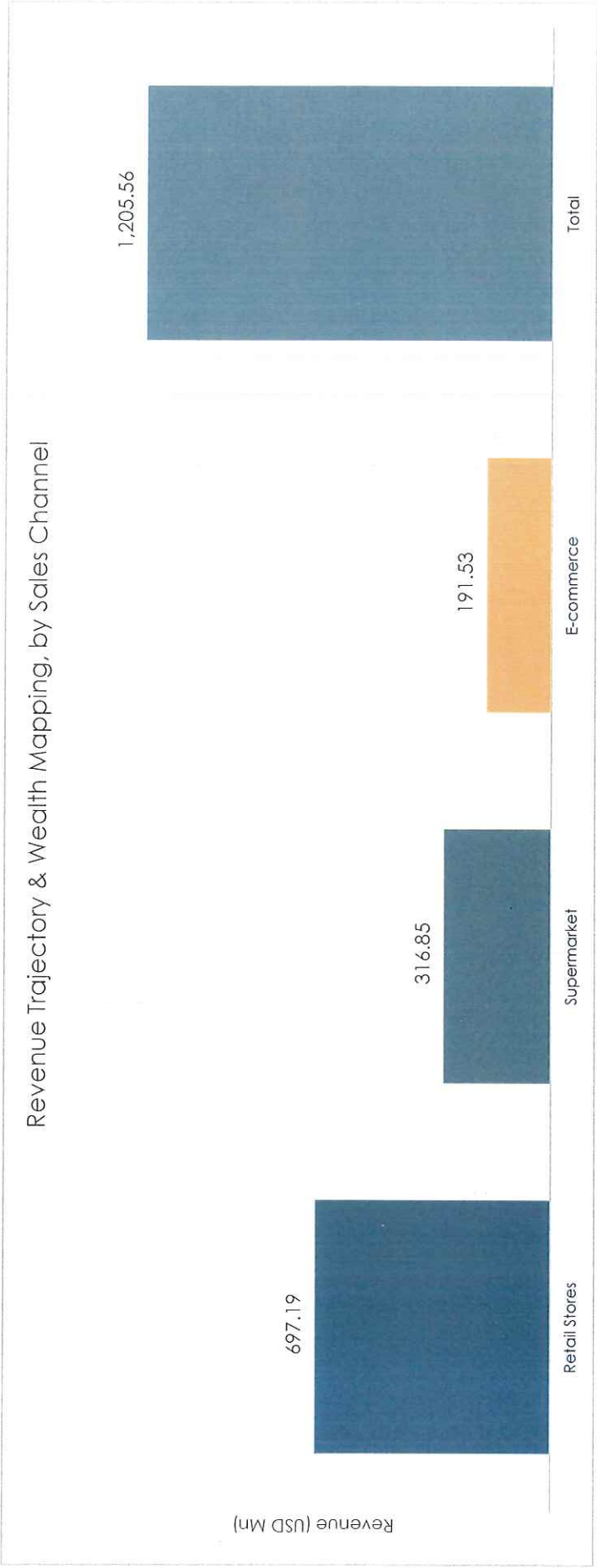


FIG NO. 6. Incremental Revenue Growth Opportunity by Sales Channel, 2024 - 2030



INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

TABLE NO. 3.: India Hygiene Product Market Revenue, By Sales Channel, 2018 – 2024 (USD Million)

Sales Channel	2018	2019	2020	2021	2022	2023	2024
Retail Stores	1,092.38	1,085.41	1,151.52	1,220.41	1,296.98	1,381.42	1,474.51
Supermarket	366.54	368.97	396.55	425.77	458.40	494.63	534.86
E-commerce	150.12	154.66	169.99	186.50	205.03	225.75	248.93
Total	1,609.04	1,609.04	1,718.06	1,832.68	1,960.41	2,101.79	2,258.30

TABLE NO. 4.: India Hygiene Product Market Revenue, By Sales Channel, 2025 – 2030 (USD Million)

Sales Channel	2025	2026	2027	2028	2029	2030	CAGR
Retail Stores	1,569.83	1,672.57	1,783.39	1,902.99	2,032.14	2,171.69	6.71%
Supermarket	576.89	622.69	672.63	727.14	786.67	851.71	8.10%
E-commerce	273.62	300.81	330.77	363.81	400.24	440.46	9.99%
Total	2,420.33	2,596.07	2,786.80	2,993.93	3,219.05	3,463.86	7.43%

Chapter No. 7 : Company Profile

7.1. Procter & Gamble

7.1.1. Company Overview

Company Logo	
Website	www.in.pg.com
Establishment	1964 in India
Employees	~421 in India
Overview	Procter & Gamble (P&G) India is a prominent player in the Indian hygiene product market, with a strong and diversified portfolio across personal hygiene, baby care, and feminine hygiene categories. The company holds a dominant market position, driven by its trusted brands and deep consumer penetration across both urban and rural segments. P&G India's key hygiene-focused brands include Pampers, one of the leading baby diaper brands in India; Whisper and Always, which cater to feminine hygiene with a wide range of sanitary pads and liners; and Always Discreet, targeting the emerging adult incontinence segment. The company also offers Vicks healthcare wipes, expanding its hygiene-related offerings in the personal care space.

	P&G India has consistently prioritized product innovation, with a focus on affordability, skin-friendly materials, and higher absorbency tailored to meet the evolving needs of Indian consumers. The company invests significantly in consumer awareness and education programs, especially around menstrual hygiene, through initiatives like Whisper's "Touch the Pickle" and school campaigns that aim to break taboos and improve hygiene practices.
--	--

Headquarters

P&G Plaza, Cardinal Gracias
Road, Chakala, Andheri East,
Mumbai, Maharashtra 400099

Competitors

JNTL Consumer Health (India)
Private Limited (Kenvue),
Kimberly-Clark India Pvt Ltd.,
Unicharm India Private Limited,
H R Hygiene Pvt. Ltd

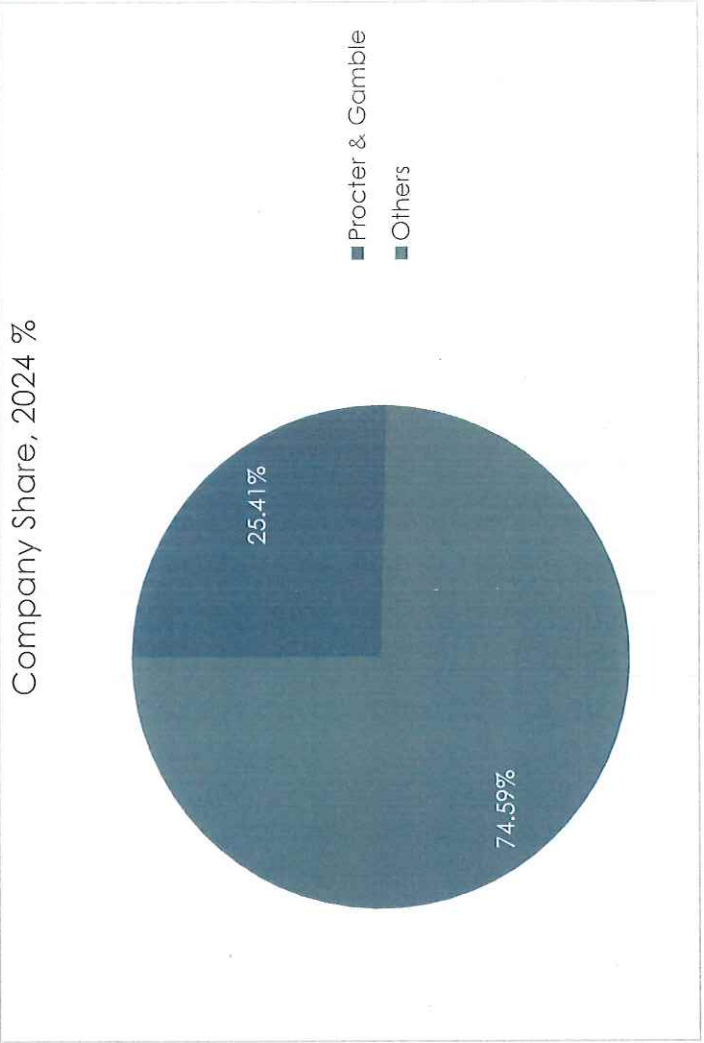
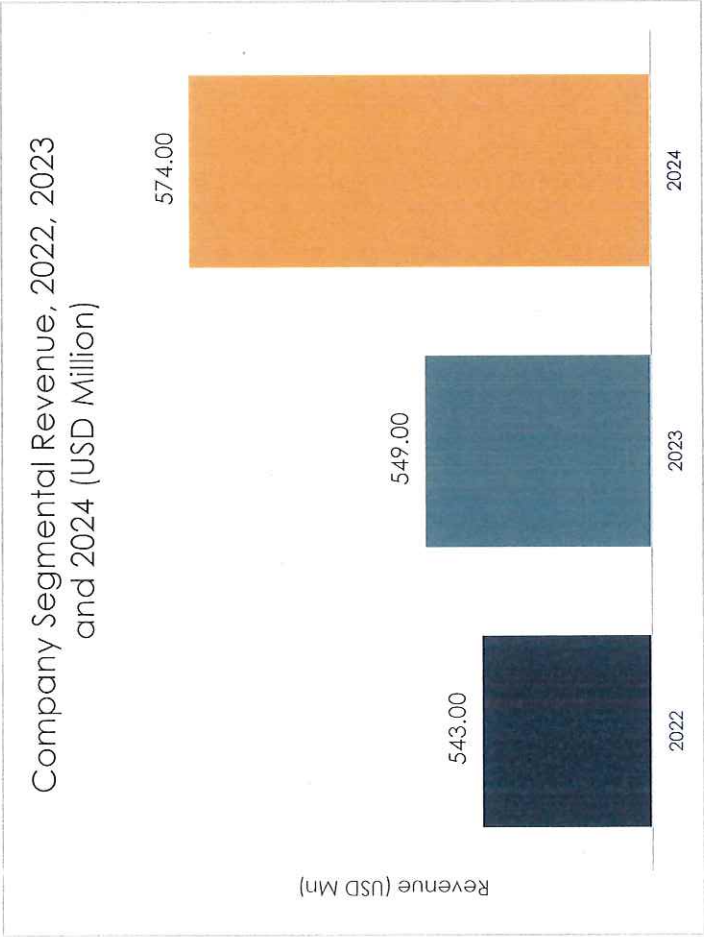
Contact Information

Andheri East, Mumbai,
Maharashtra 400099
Phone: +91-22-6958-6000,
+91 22 68669000

7.1.2. Product Portfolio

Product	Description
Pampers	Leading baby diaper brand offering diapers and wipes focusing on leak protection, breathability, skin friendliness, and comfort for newborns to toddlers. Product lines include Pampers Premium Care, Pants, Active Baby, and Baby Wipes designed for sensitive skin.
Always Discreet	Adult incontinence underwear and pads designed for high absorbency, comfort, odor control, and discreetness. Products target adults managing urinary incontinence with various sizes and absorbency levels.
Whisper	Sanitary napkins and pads known for superior absorption, comfort, and odor control. Varieties include ultra-thin, extra-long, scented/unscented, and anti-bacterial options, catering to diverse needs from daily to heavy flow menstrual cycles. Education campaigns support awareness and usage.
Baby Wipes / Wipes	These are wet wipes for babies with lotion + aloe vera to protect baby skin, prevent rash and redness. They include features like: special lid for freshness, single-wipe pull, mild fragrance, ~97% water content, paraben free, infused with Vitamin E.
Baby Diapers	Diaper pants (pull-on style) in sizes NB, Large, XL etc., with aloe vera + cotton-like softness, designed for comfortable fit, absorption, gentle materials for baby skin.

7.1.3. Financial Overview



7.2. H R Hygiene Pvt. Ltd

7.2.1. Company Overview

Company Logo	 H R HYGIENE PRODUCTS PVT. LTD.
Website	www.hrhygiene.com
Establishment	2017
Employees	~25+
Overview	H R Hygiene Products Pvt. Ltd., established in 2017, is a forward-thinking manufacturing venture based in Rajkot, Gujarat, in the western region of India. It emerged as a diversification initiative from two well-established enterprises, Marshal Steels and Tirupati Agro bringing with it a strong legacy of industrial expertise and entrepreneurial success. The state of art facility of company gives priority to the hygienic environment which is equipped with full automation in material to manufacturing products. Specializing in world-class absorbent intimate hygiene products, H R Hygiene focuses primarily on producing female-friendly sanitary pads, while also working on a broader range of female care hygiene solutions. The company has carved out a niche in India's rapidly growing hygiene market by aligning its product innovation with the unique needs of Indian women. This includes thoughtful consideration of Indian dermatological conditions and diverse climate factors, ensuring comfort, safety, and performance even in challenging environments.

Headquarters

H3 House, "Shri Ram",
Gulabnagar Street No. – 1 Off
SBI Bank, Near Azad Chowk,
Raiya Road Rajkot, Gujarat,
India 360007

Competitors

Wellify (Piramal group),
Kimberly-Clark India Pvt Ltd.,
Unicharm India Private Limited,
Procter & Gamble, Ginni
Filaments Limited

Contact Information

Raiya Road Rajkot, Gujarat,
India 360007

Phone: +91 63528 72056, +91
63535 40490

Email: wecare@hrhygiene.com

7.2.2. Product Portfolio

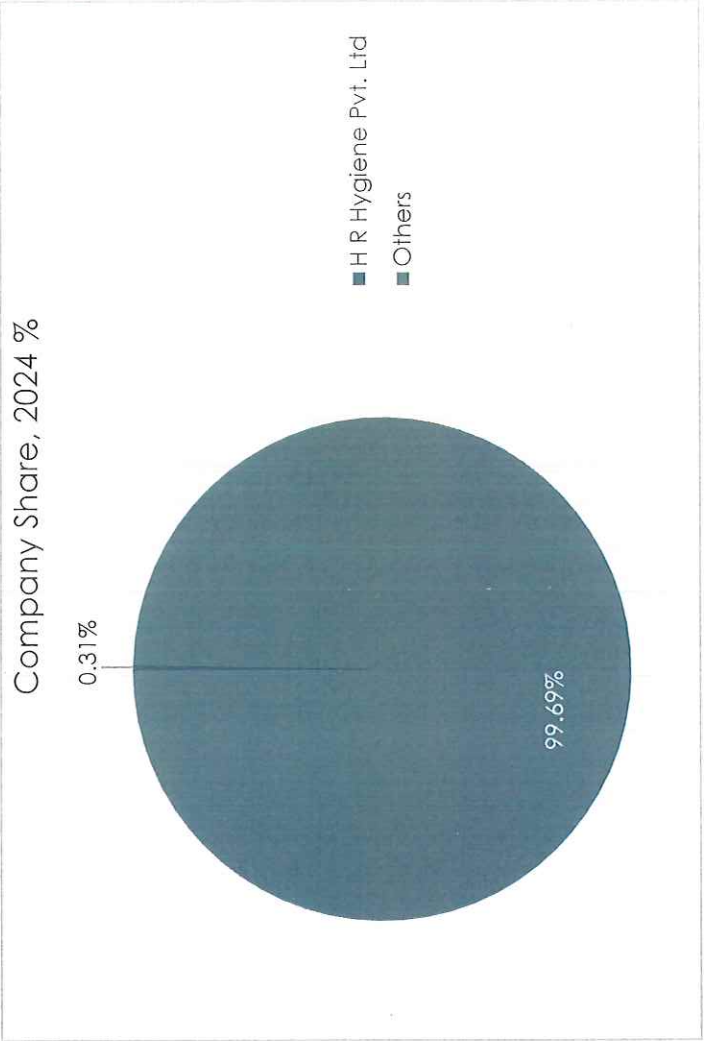
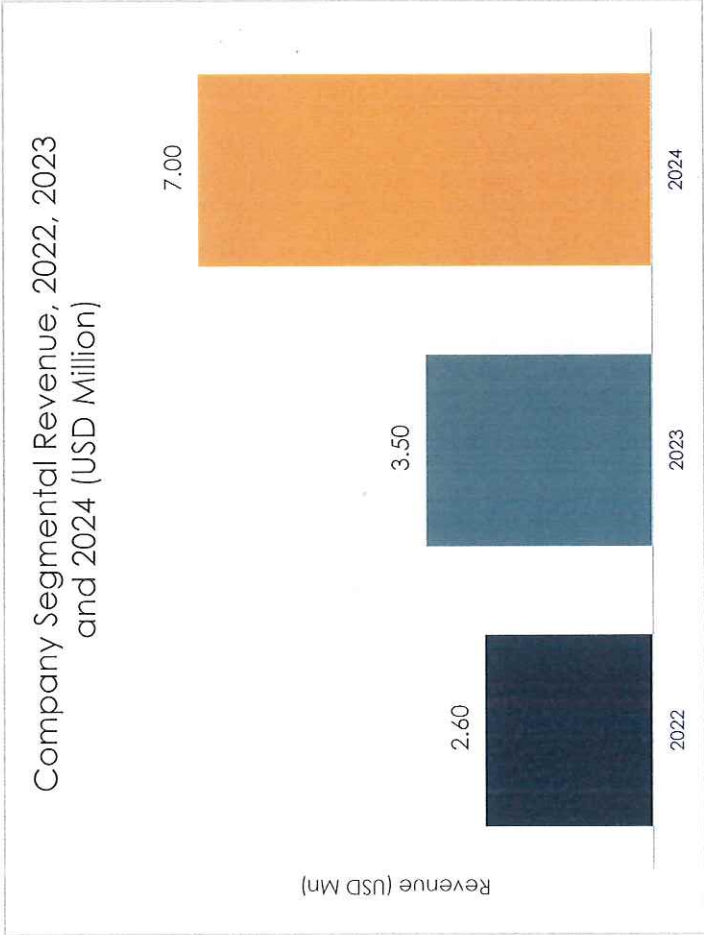
Product	Description
Femiss Regular Sanitary Pad Ultra-Thin / Maxi / Extra Large / Eco Double Plus etc.	• Pads designed for different flow requirements; variants include wings for better fit and leakage protection. Materials are chosen for softness, good absorbency, and comfort in Indian climate. They offer “Cottony Regular Maxi” designs, and more protective “Ultra-Thin” versions
Femiss Cotton Ear Swabs / Cotton Buds / Cotton Swabes	• These are multi-purpose hygiene products made with soft, high-quality cotton tips and firm stems for easy handling. They are designed for gentle personal care use, such as ear cleaning, makeup removal, skincare application, or cleaning delicate areas. Femiss swabs are safe, hygienically packed, and intended for single use. Their absorbent cotton tips are tightly wound to prevent unraveling, ensuring safety during use and making them suitable for both adult and baby care.

For Credence Research Inc.

72 | Page

Proprietor

7.2.3. Financial Overview



7.3. Kimberly-Clark India Pvt Ltd.

7.3.1. Company Overview

Company Logo	
Website	www.kimberly-clark.com
Establishment	1994
Employees	~937
Overview	Kimberly-Clark India is a prominent player in the Indian hygiene products market, operating as a subsidiary of Kimberly-Clark Corporation, one of the world's leading personal care and consumer goods companies. With a legacy spanning over 150 years globally, Kimberly-Clark has established itself in India as a trusted name in hygiene and wellness through its iconic portfolio of brands such as Huggies, Kotex, Kleenex, and Depend. The company's presence in India is centered around providing innovative, science-backed hygiene and personal care solutions tailored to the diverse needs of Indian consumers across age groups and demographics. Its flagship brand Huggies is a leading choice in the baby care segment, while Kotex is redefining feminine hygiene with a focus on comfort, design, and sustainability. The Kleenex and Depend brands cater to adult hygiene and wellness needs, expanding Kimberly-Clark's reach into underpenetrated yet rapidly growing segments.

Headquarters

Kimberly-Clark India Pvt. Ltd. Art
Guild House, Phoenix Market
City, LBS Marg, Kurla (West),
Mumbai

Competitors

Procter & Gamble, Procter &
Gamble, Unicharm India
Private Limited, H R Hygiene
Pvt. Ltd

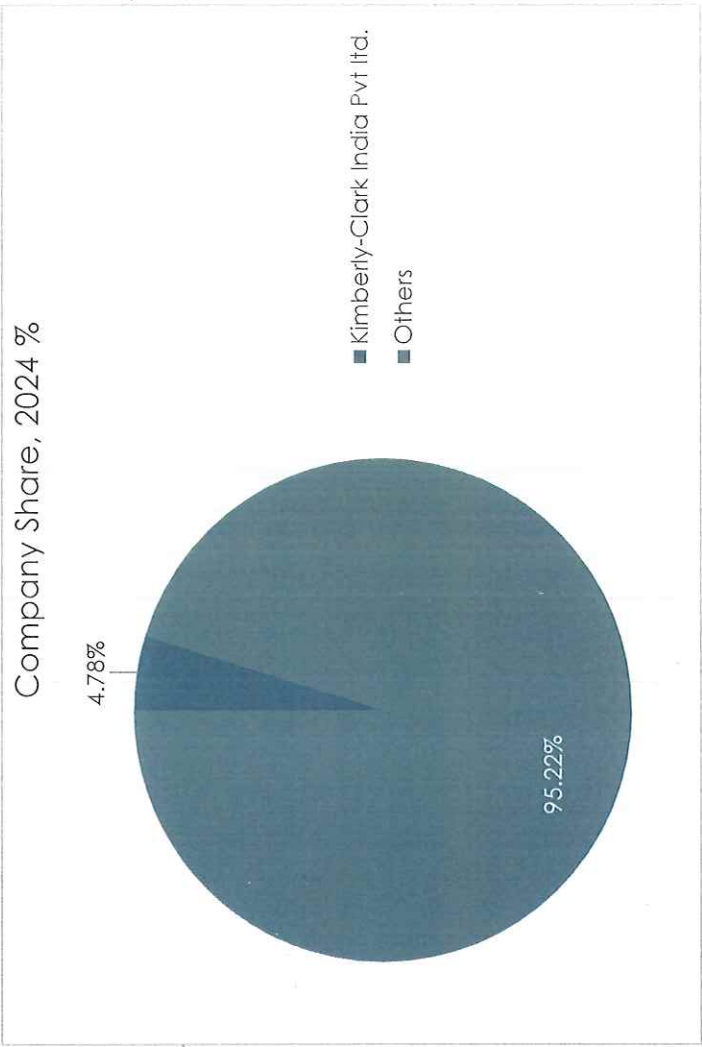
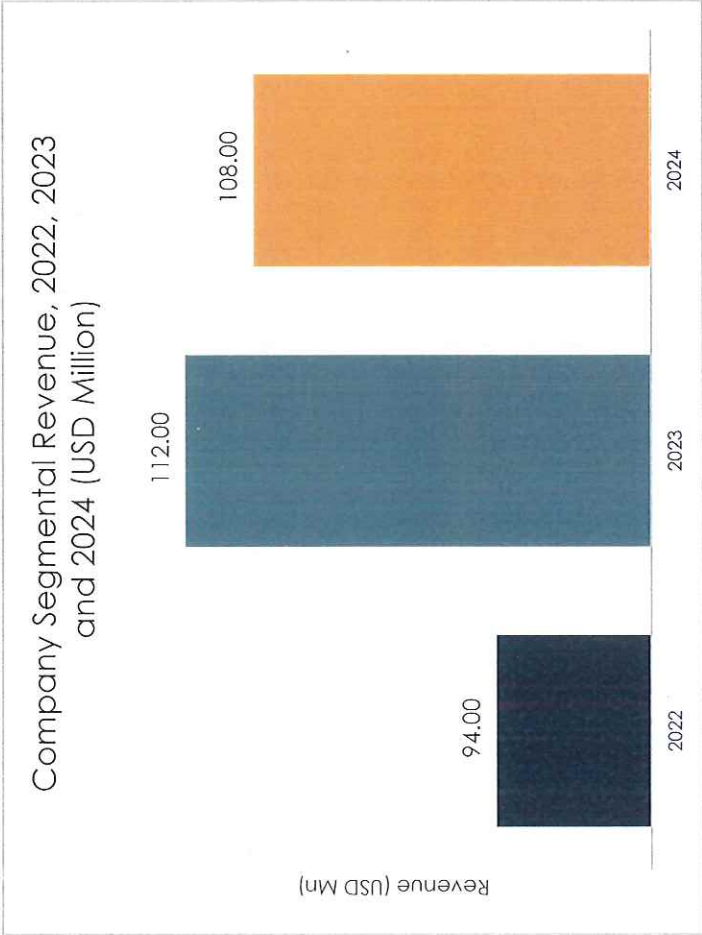
Contact Information

Kimberly-Clark India Pvt. Ltd. Art
Guild House, Phoenix Market
City, LBS Marg, Kurla (West),
Mumbai, 400 070
Phone: (022) 33220000

7.3.2. Product Portfolio

Product	Description
Huggies Wonder Pants, Huggies Nature Care, Huggies Newborn	Baby diaper range designed for comfort, overnight protection, and skin-friendliness. Includes pant-style diapers with 12-hour leak lock, breathable materials, and options for sensitive skin.
Depend	Adult incontinence solutions such as absorbent underwear and briefs. Designed for men and women dealing with moderate to heavy bladder leakage. Features odor control and discreet fit.
Kotex ProHealth+	High-absorbency sanitary pads with anti-leak channels, fragrance, and soft topsheet. Designed for comfort and all-day protection. Recently re-launched in India.
Kotex ProHealth+	A newer offering in India (from Kotex) with health-focused features. The “#ChooseItAll” campaign emphasizes balanced protection without compromise (absorbency, rash prevention, comfort). The brand aims for healthy period protection.
Huggies Baby Wipes	Gentle wipes enriched with aloe vera and vitamin E, ideal for baby skincare. Alcohol-free and dermatologically tested. Widely used for diaper changes and general hygiene.

7.3.3. Financial Overview



7.4. Redcliffe Hygiene Private Limited

7.4.1. Company Overview

Company Logo	
Website	www.redcliffehygiene.com
Establishment	2017
Employees	~116
Overview	Redcliffe Hygiene Private Limited stands as a pioneer and leader in the personal hygiene sector both in India and on the global stage, offering a comprehensive portfolio of over 200 hygiene consumable products. The company has earned its reputation as the largest seller of toilet hygiene products in India, a testament to its deep understanding of local market dynamics and consumer needs. Leveraging a management team with more than 40 years of specialized experience in hygiene solutions, Redcliffe focuses on developing and delivering products that are specifically tailored to meet the unique hygiene requirements and stringent standards prevalent across India. Its extensive product range caters to a diverse clientele, including high-traffic public places such as hospitals, restaurants, shopping malls, and retail outlets, as well as transportation sectors including airlines and railways. Additionally, Redcliffe serves numerous corporate clients and government organizations, reinforcing its strong foothold across multiple industries. Beyond the domestic market, the company has expanded its reach through exports to key regions such as the Middle East, Africa,

For Credence Research Inc.

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

Southeast Asia, and the Pacific, demonstrating its capability to adapt and meet varied hygiene standards internationally. This broad geographic presence, combined with a customer-centric approach and robust product innovation, positions Redcliffe Hygiene Private Limited as a trusted and influential player driving hygiene standards and improving sanitation across multiple sectors.

Headquarters

Sector 31 & 32A, Gurgaon,
Haryana 122001, India

Competitors

Procter & Gamble, H R Hygiene
Pvt. Ltd, Kimberly-Clark India
Pvt Ltd., Unicharm India Private
Limited

Contact Information

Sector 31 & 32A, Gurgaon,
Haryana 122001, India
Phone: +91 9870279353

7.4.2. Product Portfolio

Product	Description
Pee Safe Adult Diaper	Designed for men & women, high absorbency, soft textile, leak-proof leg guards. Infused with Neem & Aloe Vera to reduce bacterial irritation. Hypoallergenic. Contains gel-lock technology to manage wetness
Pee Safe Men's Wash & Intimate Wipes	100 ml wash + wipes; formulated with Tea Tree oil, Witch Hazel, Calendula extracts, Aloe Vera and Wheat Germ. Alcohol-free. Helps maintain pH, reduce irritation, cleanse post-activity or after sweating etc.
Sanitary Pads	Very thin pad, extra-large/XXL size for better overnight / heavy-flow protection. Offers leak protection, comfort, and wide back coverage. Featured among top sellers on Pee Safe site.
Pee Safe Organic Cotton Tampon, Regular	100% organic cotton, biodegradable, free from dyes, bleach, synthetic chemicals. Suitable for light to medium flow. Provides ~5-7 hours protection (depending on flow). Designed for comfort and easy insertion. Marketed by Redcliffe Hygiene Pvt Ltd.
Pee Safe Organic Cotton Tampon, Super / Medium Flow	Similar product but for higher absorbency: medium-to-heavy flow. 100% organic cotton, biodegradable, chlorine/dye/scent free.
Pee Safe Ultra-Thin Sanitary Pads	Ultra-thin pad with wider back, dual wings for extra leak protection during nights/overnight. Gel-lock technology (to absorb & prevent leakage). Fragrance-free, cottony soft surface to avoid irritation

7.5. Unicharm India Private Limited

7.5.1. Company Overview

Company Logo	
Website	www.unicharm.co.in
Establishment	1961
Employees	~16,464
Overview	Unicharm Corporation, established in 1961, is one of the leading hygiene products manufacturers with a strong and growing presence in India. Entering the Indian market in 2008 through Unicharm India Pvt. Ltd., the company has rapidly expanded its footprint in the baby care, feminine hygiene, and adult incontinence segments. With three local manufacturing facilities in Neemrana (Rajasthan), Sri City (Andhra Pradesh), and a newly rebuilt plant in Ahmedabad (Gujarat), Unicharm ensures stable supply, reduced logistics costs, and responsiveness to local demand. Its flagship brands in India include MamyPoko (baby diapers and wipes), Sofy (sanitary pads), and Lifree (adult diapers). The company is also actively involved in awareness programs like Project Jagriti to promote menstrual hygiene in rural areas. Unicharm's strategy focuses on growing its rural market share, expanding sustainable manufacturing, and offering differentiated products tailored to Indian consumer needs. Despite strong growth, challenges include high price sensitivity, intense competition from global and local brands, distribution hurdles in rural areas, and rising input costs.

Headquarters

Unit No. 501 to 508 & 510 to
518,5th Floor, Centrum Plaza
Building, Golf Course Road,
Sector-53, Gurgaon-122002,
India

Competitors

Procter & Gamble, H R Hygiene
Pvt. Ltd, Kimberly-Clark India
Pvt Ltd., Ginni Filaments Limited

Contact Information

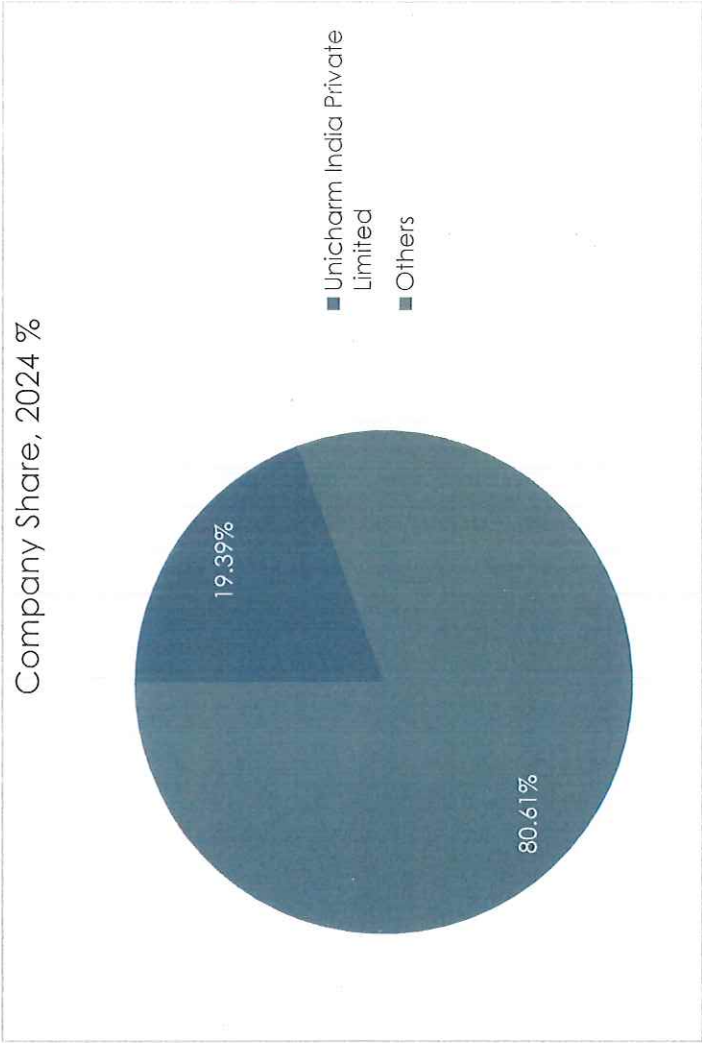
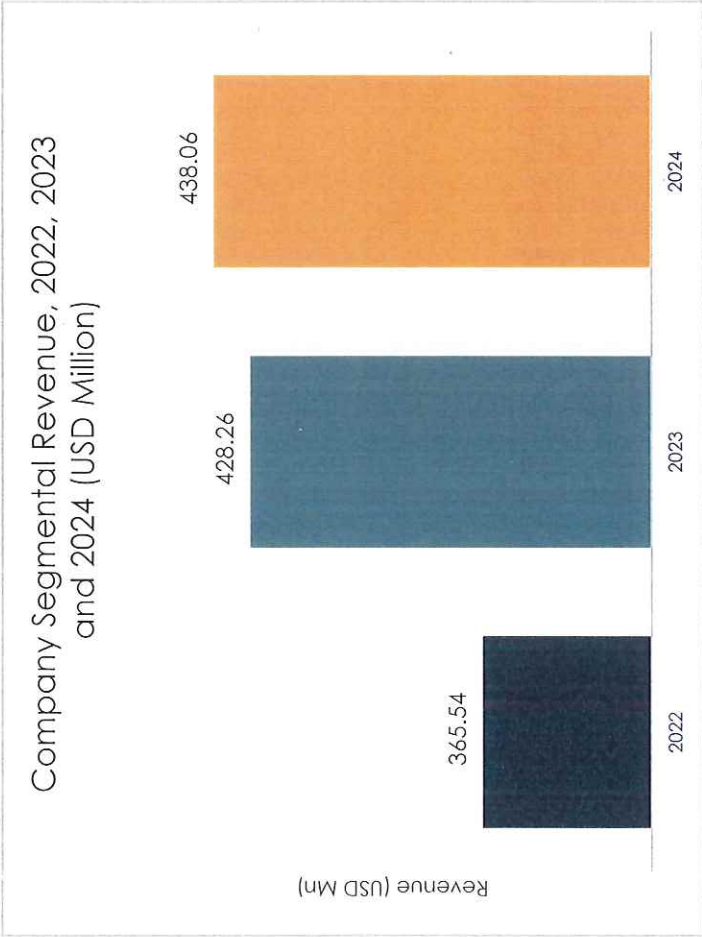
Centrum Plaza Building, Golf
Course Road, Sector-
53,Gurgaon-122002, India
Phone: 0124- 4351300

7.5.2. Product Portfolio

Product	Description
MamyPoko Pants Extra Absorb	Pant-style baby diapers designed for high absorbency, comfort, and overnight dryness. Popular for ease of use and quick absorption.
MamyPoko Pants All Night	Designed for overnight protection with enhanced leak prevention and a snug fit. Suitable for longer wear time.
MamyPoko Pants Standard	Budget-friendly option offering reliable absorbency and comfort for daily use.
MamyPoko Deep Absorption Pants	Premium variant focusing on deeper absorption and skin dryness, keeping babies comfortable for longer.
Lifree Extra Absorb Pants and Lifree Absorbent Pants	Disposable adult diapers offering high absorbency, especially useful for moderate incontinence and elderly care. General use adult diapers with quick absorption and side-leak prevention for day-long freshness.
Sofy Bodyfit Sanitary Pads	Designed to fit the body shape, preventing side leakage and ensuring all-day comfort.
Sofy Organic Cotton Pads	Made with organic cotton for sensitive skin, offering soft touch and safe absorption.

MamyPoko Extra Clean Wipes	• Soft baby wipes enriched with aloe and coconut extract; gentle on skin and suitable for daily cleaning.
MamyPoko Aloe Vera Baby Wipes	• Infused with aloe vera to soothe and clean baby skin without irritation.
Sofy Soft Tampons	• Comfortable tampons for internal menstrual protection, designed for easy use and moderate flow.

7.5.3. Financial Overview



7.6. JNTL Consumer Health (India) Private Limited (Kenvue)

7.6.1. Company Overview

Company Logo	
Website	www.kenvue.com
Establishment	2022
Employees	~1,103 in India
Overview	Kenvue India (formerly Johnson & Johnson Consumer Health) has established itself as a strong player in India's consumer health and hygiene sector by leveraging a portfolio of trusted heritage brands and aligning its strategy with evolving consumer needs. Since spinning off into a standalone company in 2023, Kenvue has doubled down on "everyday care" and essential health segments, using science-backed product innovation and premium offerings to differentiate in a crowded market. Much of Kenvue's growth in India has come from its prioritization of a select group of brands where it sees both scale and unmet demand. For example, Johnson's Baby, Stayfree (menstrual hygiene), Listerine (oral hygiene), and ORSL (fluid electrolyte & energy solutions) are among its "priority brands," receiving focused investment in marketing, distribution, and innovation. The company also engages in health-professional partnerships and thought leadership as part of its positioning.

For Credence Research Inc.

Headquarters

JNTL Consumer Health (India)
Private Limited, 4th Floor Arena
Space, Behind Majas Bus
Depot, Off Jogeshwari Vikhroli
Link Road, Jogeshwari (E),
Mumbai 400060

Competitors

Procter & Gamble, Procter &
Gamble, Kimberly-Clark India
Pvt Ltd., Wellify (Piramal group)

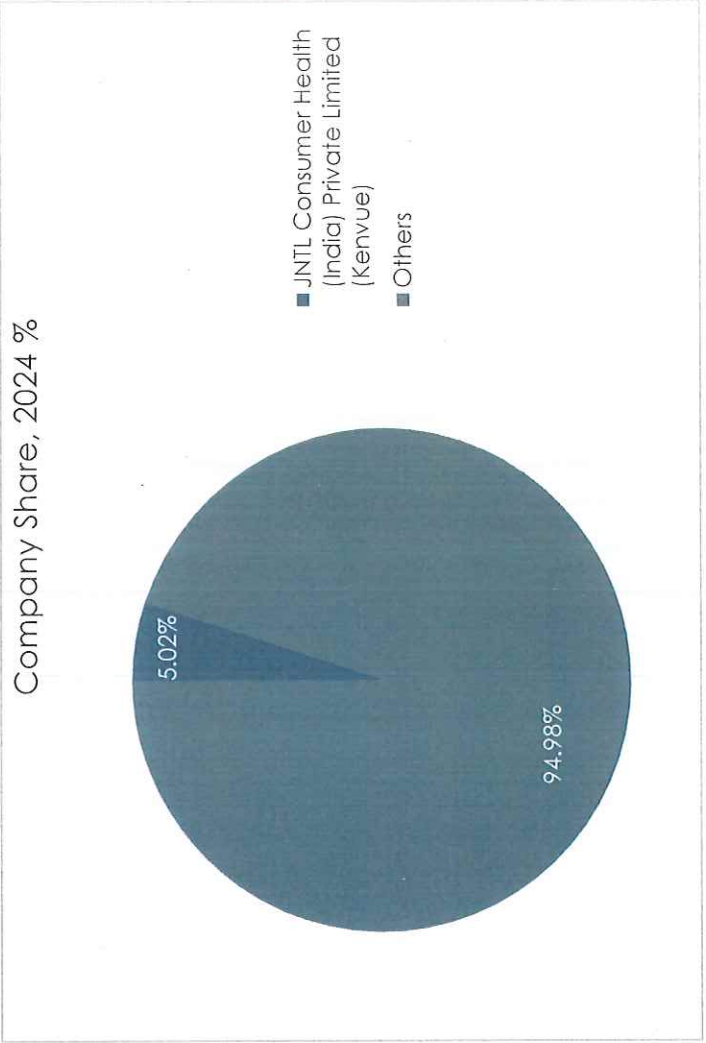
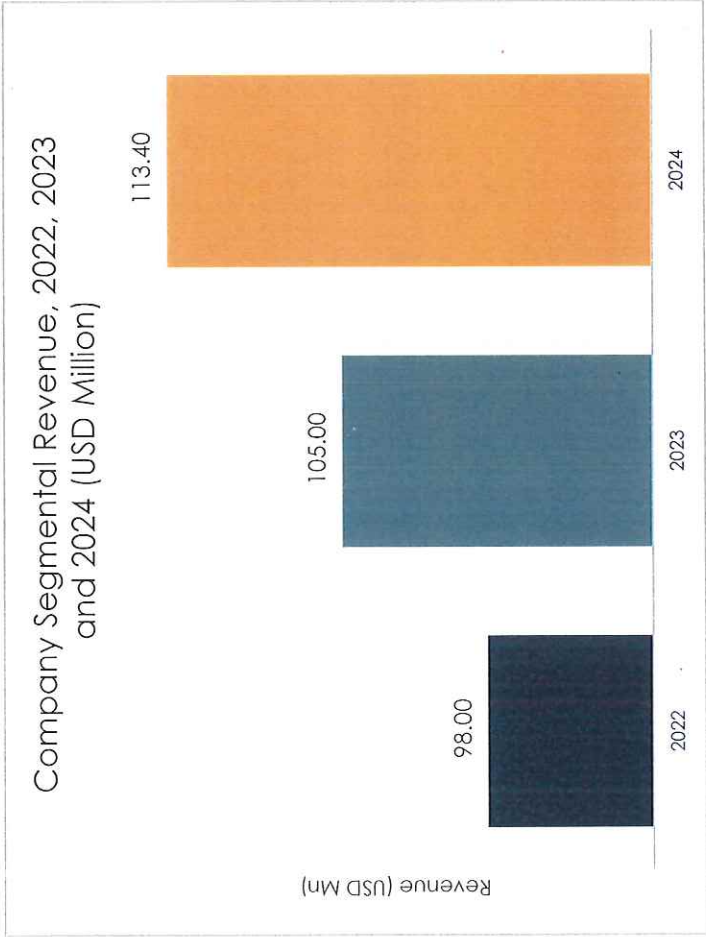
Contact Information

Jogeshwari (E), Mumbai 400060
Phone: 1-800-228-1111
Email: mvasani@kenvue.com

7.6.2. Product Portfolio

Product	Description
Sanitary Pads	Kenvue's Stayfree sanitary napkins are designed to provide protection and comfort during menstruation. They come in multiple variants including Ultra-Thin, Secure Cottony, Dry-Max All Night, and XL with Wings.
Johnson's Baby Skincare Wipes	These are mild, alcohol-free baby wipes made to clean delicate baby skin during diaper changes. They contain moisturizing lotion and are designed to remove impurities without irritating the skin. The wipes are dermatologically tested, soft, and enriched with 3x moisture-lock formula, helping retain natural skin moisture while gently cleansing.
Cotton Swabs	These cotton swabs are made with soft, pure cotton tips and are sterilized and clinically tested. Intended for gentle cleaning of delicate areas like the outer ear, nose, or baby's skin folds. Suitable for babies and adults. They are designed with safety stops to prevent deep insertion into the ear canal.
Stayfree o.b. tampons	The Stayfree o.b. tampons are designed for internal menstrual hygiene. Available in Regular and Super absorbency, they feature 3D expansion, interlocked grooves for better absorption, and a SilkTouch cover for easier insertion and removal. These tampons are free from added fragrances and chlorine bleaching. They're ideal for women looking for discreet, comfortable menstrual protection.

7.6.3. Financial Overview



7.7. Ginni Filaments Limited

7.7.1. Company Overview

Company Logo	 GINNI FILAMENTS LTD.
Website	www.ginnifilaments.com
Establishment	1982
Employees	~2,472
Overview	Ginni Filaments Limited is a vertically integrated Indian company that plays a significant role in the India Hygiene Product Market through its advanced capabilities in nonwoven spunlace fabric manufacturing and hygiene product conversion. Established in 1982 and headquartered in Noida, Uttar Pradesh, Ginni has grown from a textile and yarn manufacturer into a diversified player, especially known for its contributions to the personal care, baby care, home care, and institutional hygiene segments. The company employs around 2,472 people and operates major manufacturing facilities in Panoli (Gujarat) and Noida (U.P.), with a notable spunlace nonwoven production capacity of around 12,000 metric tonnes per year. Its Gujarat unit uses European technology (Andritz Perfojet) to produce high-quality nonwoven fabrics used in wet wipes, baby wipes, medical disposables, and cosmetic wipes — making Ginni one of the leading raw material suppliers in the hygiene space. In addition to nonwoven roll goods, Ginni Filaments also operates large-scale conversion units to manufacture finished hygiene products, such as wet wipes and dry wipes for domestic and export clients.

Headquarters

D – 196, Sector – 63, Noida -
201307 (U.P.) India

Competitors

H R Hygiene Pvt. Ltd , JNTL
Consumer Health (India)
Private Limited (Kenvue),
Procter & Gamble, Kimberly-
Clark India Pvt Ltd.

Contact Information

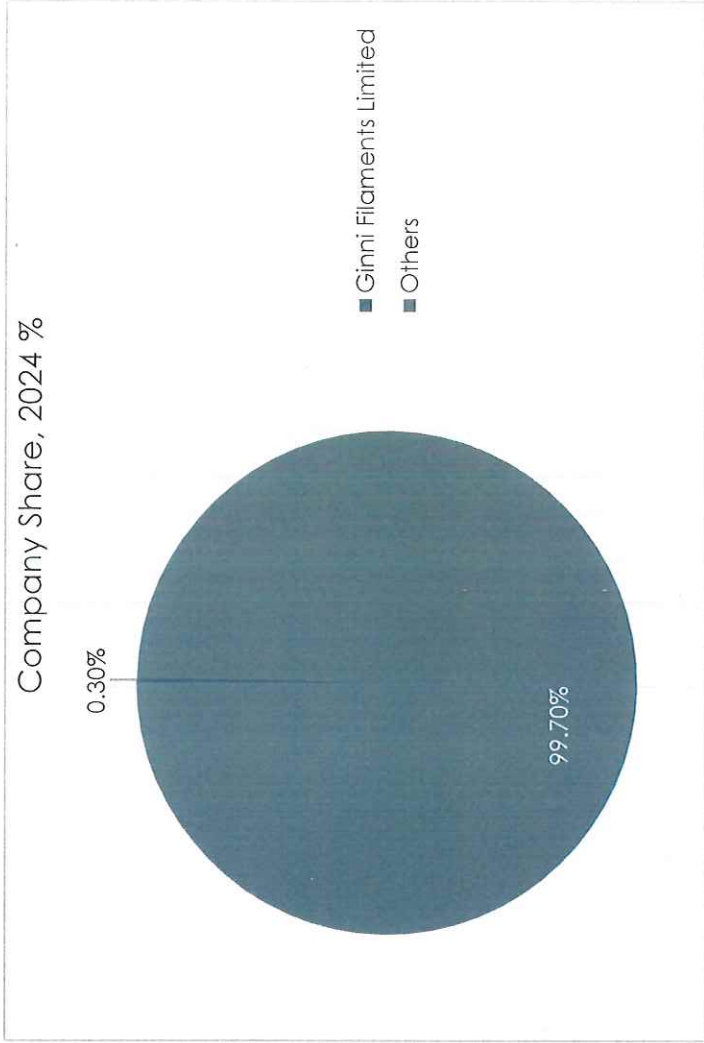
D – 196, Sector – 63, Noida -
201307 (U.P.) India
Phone: 0120 – 4058400

7.7.2. Product Portfolio

Product	Description
Anti-Bacterial Wipes	Designed to kill or inhibit the growth of bacteria on hands or surfaces. These wipes are ideal for quick cleaning when soap and water are not available. Formulated with mild antiseptics and safe for regular use.
Hand Sanitizing Wipes	Alcohol or non-alcohol-based wipes that sanitize hands on the go. Gentle on skin but effective in removing germs and dirt. Ideal for travel, public spaces, and before meals.
Refreshing Wipes	Lightly fragranced and moistened wipes meant to clean and freshen up the skin. Often used for face and hands to remove sweat, dust, or odor during hot weather or travel.
Feminine Wipes	Specifically formulated for women's personal hygiene needs. These wipes are pH-balanced, alcohol-free, and enriched with soothing agents to clean the intimate area gently and safely.
Intimate Wipes	Ultra-gentle wipes designed for intimate areas for both men and women. Help maintain hygiene during travel, menstruation, or post-workout. Prevents irritation and keeps the area fresh.
Handkerchief / Dry Tissue Wipes	Disposable, soft nonwoven tissues meant to replace traditional handkerchiefs. Absorbent and ideal for wiping face, hands, or sweat without reusing cloths.
Toilet Wipes	Soft, moist wipes used after toilet visits to enhance hygiene and comfort. A modern alternative to dry toilet paper. Not flushable — meant to be disposed of in a bin.

Exfoliating Wipes	Contain fine exfoliating agents or textured surfaces to remove dead skin cells, unclog pores, and refresh the skin. Used on face or body as part of skincare routine.
-------------------	---

7.7.3. Financial Overview



7.8. Wellify (Piramal group)

7.8.1. Company Overview

Company Logo	
Website	www.wellify.in
Establishment	2023 (Wellify)
Employees	~40 in Wellify
Overview	Wellify operates as the hygiene, protection, intimate health, skin care, and overall wellness arm of Piramal CPD, serving as a D2C digital channel addressing growing consumer demand in India for hygiene and personal care products. Its product catalogue includes established house-of-brands as well as a women's intimate health range. Leveraging e-commerce infrastructure, Wellify aims to offer authentic, branded hygiene and protection goods with no minimum order value, wide pin-code serviceability (over 25,000 PIN codes), and fast fulfillment through multiple warehouses. To support quality and delivery consistency, Wellify has adopted modern operations tools (e.g. Unicommerce for warehouse & order/inventory management) and joined broader commerce networks (ONDC) for greater discoverability. Overall, Wellify acts as both a product brand aggregator and a hygiene product provider in India, aiming to capture a share of the hygiene / intimate protection market via direct consumer engagement.

Headquarters

Piramal Ananta, Agastya Corp.
Park, Kamani Junction, LBS
Marg, Kurla, Mumbai,
Maharashtra 400070, India

Competitors

JNTL Consumer Health (India)
Private Limited (Kenvue),
Unicharm India Private Limited,
Kimberly-Clark India Pvt Ltd.

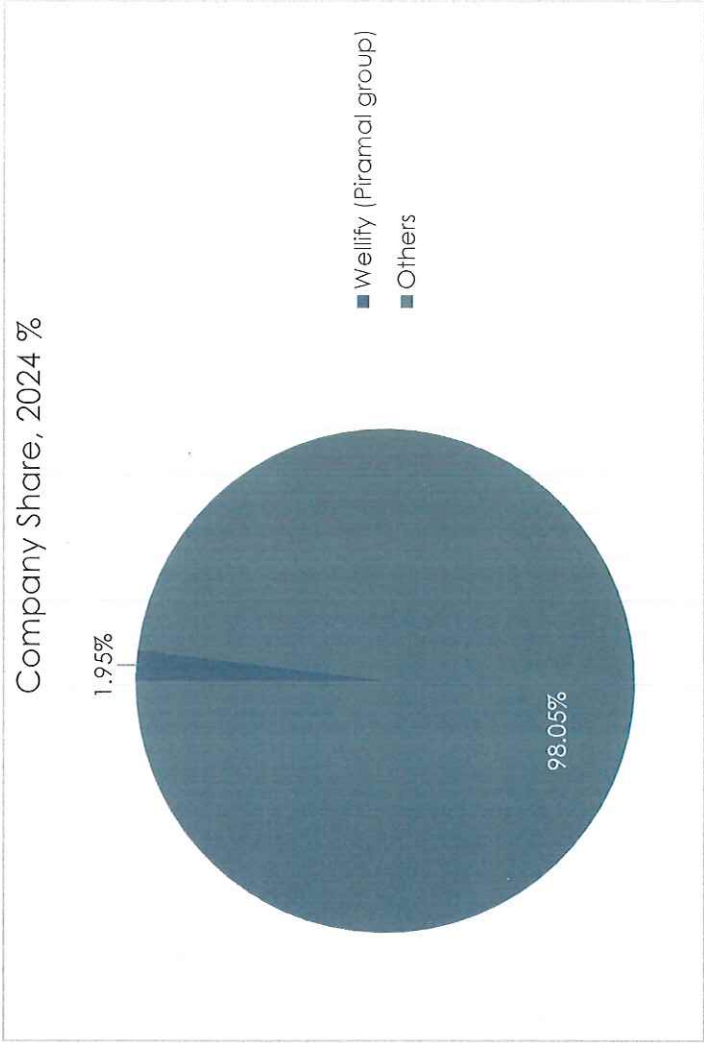
Contact Information

Kurla, Mumbai, Maharashtra
400070, India
Phone: 1800229898
Email:
consumercare@piramal.com

7.8.2. Product Portfolio

Product	Description
Little's Soft Cleansing Baby Wipes	Thick, moist baby wipes specially formulated to gently cleanse and moisturize delicate baby skin. Enriched with natural soothing agents like Aloe Vera, Jojoba Oil, and Vitamin E, these wipes help maintain skin hydration and protect against irritation.
CIR Soft Body Cleansing Wet Bed Bath Wipes	Designed for gentle cleansing of bedridden or immobile adults, these thick, moisturizing wipes effectively clean the skin without drying it out. Paraben-free and enriched with skin-friendly ingredients, they support hygiene when regular bathing isn't possible. Convenient for caregivers and home care, they provide comfort and refreshment during personal care routines.
CIR Premium Adult Tape Diapers	Featuring an easy-to-use tape fastening system, these adult diapers offer enhanced absorbency for overnight use or extended wear. The fabric is soft and breathable, enriched with Aloe Vera to soothe the skin.
Little's Baby Diaper Pants Premium	Designed with a super absorbent core, these diaper pants maintain dryness for long hours. The breathable fabric enhances airflow to reduce moisture buildup, which minimizes the chances of skin irritation.
Little's Comfy Baby Diaper Pants	These premium baby diaper pants are designed to offer exceptional comfort and dryness for your baby throughout the day and night. They provide up to 12 hours of absorption and feature a color-changing wetness indicator that alerts caregivers when it's time for a change.
i-Activ Menstrual Cup	Made of 100% medical-grade silicone, the i-Activ Menstrual Cup is ultra-soft, rash and leak-free. Provides 8-10 hours of protection and comes with a free sterilizer case and pouch.

7.8.3. Financial Overview



7.9. Sirona

7.9.1. Company Overview

Company Logo	
Website	www.thesirona.com
Establishment	2014
Employees	~107
Overview	Sirona Hygiene Pvt. Ltd., established in 2014 by entrepreneurs Deep and Mohit Bajaj, has rapidly emerged as one of India's most innovative and forward-thinking hygiene brands, especially in the feminine hygiene segment. With a deep commitment to addressing the often-tabooed and unspoken hygiene challenges faced by women across the country, Sirona has pioneered several groundbreaking products designed to enhance women's personal care experiences. The company's product portfolio has since expanded to include menstrual cups, biodegradable period care products, intimate washes, and wipes, alongside herbal period pain relief patches and other personal hygiene essentials. By integrating scientific research with traditional knowledge and sustainability, Sirona has carved a niche in India's growing hygiene product market, which is witnessing increasing awareness and demand for safe, eco-conscious, and effective hygiene products.

Headquarters

101-103, Tower A, Pioneer Urban
Square, Sector 62, Golf Course
Extn. Road, Gurugram

Competitors

Procter & Gamble , Wellify
(Piramal group), JNTL
Consumer Health (India)
Private Limited (Kenvue),
Redcliffe Hygiene Private
Limited

Contact Information

101-103, Tower A, Pioneer Urban
Square, Sector 62, Golf Course
Extn. Road, Gurugram
Phone: +91 9718 866644
Email: info@thesirona.com

7.9.2. Product Portfolio

Product	Description
Sirona Premium Digital Tampon , Medium Flow	These tampons are designed specifically for medium flow days, providing comfortable and secure protection. They feature a smooth applicator for easy insertion and are made with materials that ensure leak-proof performance throughout the day. The digital design enhances hygiene and convenience for everyday use.
Sirona Premium Digital Tampon , Heavy Flow	Ideal for heavy menstrual flow, these tampons offer superior absorbency and comfort. The ergonomic design ensures easy insertion and removal, while the premium materials prevent irritation and provide reliable leak protection even during intense activity.
Sirona Premium Applicator Tampons, Normal Flow	These BPA-free tampons come with ultra-soft applicators for gentle and hygienic insertion. Suitable for normal flow days, they provide excellent absorbency without compromising comfort. The tampons are designed to prevent leaks and maintain dryness, helping users stay confident and comfortable throughout their day.
100% Organic Cotton Tampons, Heavy Flow	Crafted from 100% organic cotton, these tampons offer a chemical-free and eco-friendly alternative for heavy flow days. They are gentle on sensitive skin, reducing the risk of irritation and allergic reactions. The organic cotton ensures high absorbency while maintaining breathability, making them an excellent choice for health-conscious consumers.
Sirona Cottony Soft Rash-Free Sanitary Pads	These sanitary pads feature a soft cottony top sheet designed to minimize skin irritation and prevent rashes. The XL plus size offers extra coverage and protection for heavy flow days. They are highly absorbent,

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

	breathable, and designed for maximum comfort, making them suitable for extended wear without discomfort.
Sirona Cottony Soft Rash-Free Sanitary Pads	This pack contains high-absorbency pads suitable for heavy menstrual flow. The breathable design reduces moisture buildup and keeps skin dry, preventing rashes and irritation. The pads provide leak-proof protection with extra length and width for enhanced security, especially during overnight use or long hours out of the home.
Sirona Sanitary Pads	These economical XL-sized pads provide reliable protection for moderate to heavy flow days. They feature a comfortable fit with a soft top layer and secure adhesive to prevent shifting. Their design focuses on ease of use and everyday comfort, making them a practical choice for users looking for quality and affordability.

7.10. Nobel Hygiene Private Limited

7.10.1. Company Overview

Company Logo	 Nobel Hygiene
Website	www.nobelhygiene.com
Establishment	2001
Employees	~500+
Overview	Nobel Hygiene Pvt. Ltd. is one of the largest and most respected Indian manufacturers in the disposable hygiene product segment, with a strong legacy of over two decades since its incorporation in 2001. The company has established itself as a market leader, particularly in the adult incontinence care category, and holds a robust position in the baby care hygiene segment as well. Nobel Hygiene's mission is centered around delivering high-quality, affordable, and India-specific hygiene solutions that cater to people across all age groups, from infants to the elderly. The company's product portfolio spans baby diapers, adult diapers, pull-up pants, underpads, maternity pads, wet wipes, nappy pads, and more. These are marketed under well-known brand names like Teddy (baby care) and Friends (adult care). The brands have become household names, recognized for their comfort, reliability, and affordability. Nobel Hygiene's products are designed

INDIA HYGIENE PRODUCT MARKET, 2018 – 2030

specifically for the Indian body type, skin sensitivity, and climate, which differentiates them from many imported or globally standardized offerings.

Headquarters

Plot No. A-70, MIDC, Malegaon,
Sinnar, Maharashtra, India,
422113

Competitors

Wellify (Piramal group), Ginni
Filaments Limited, Redcliffe
Hygiene Private Limited

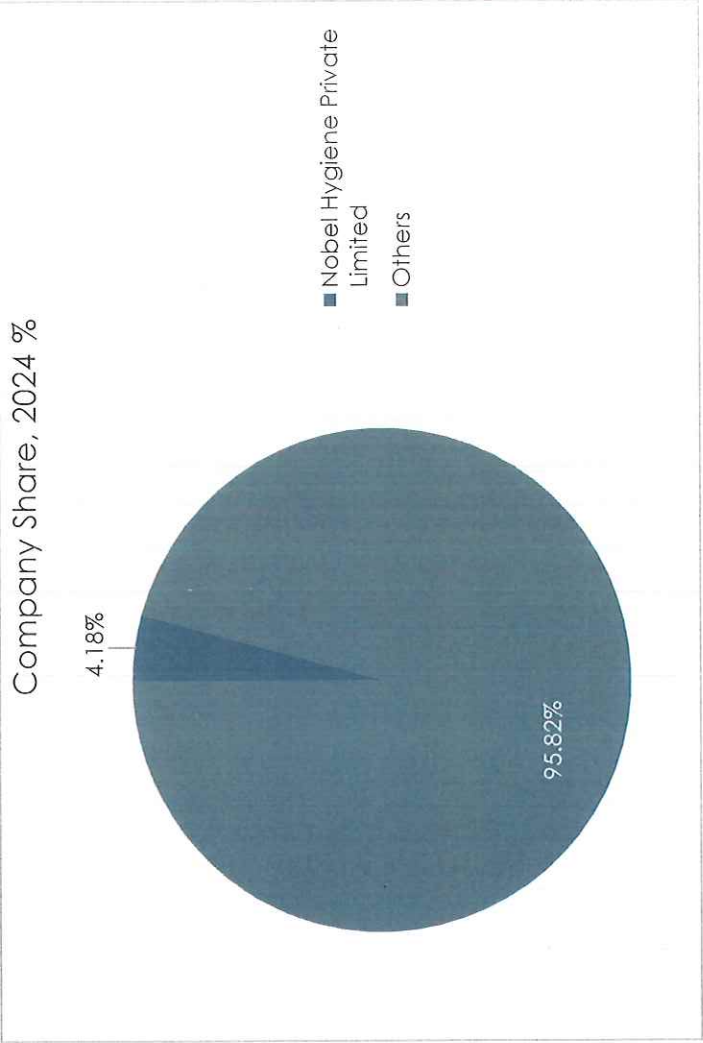
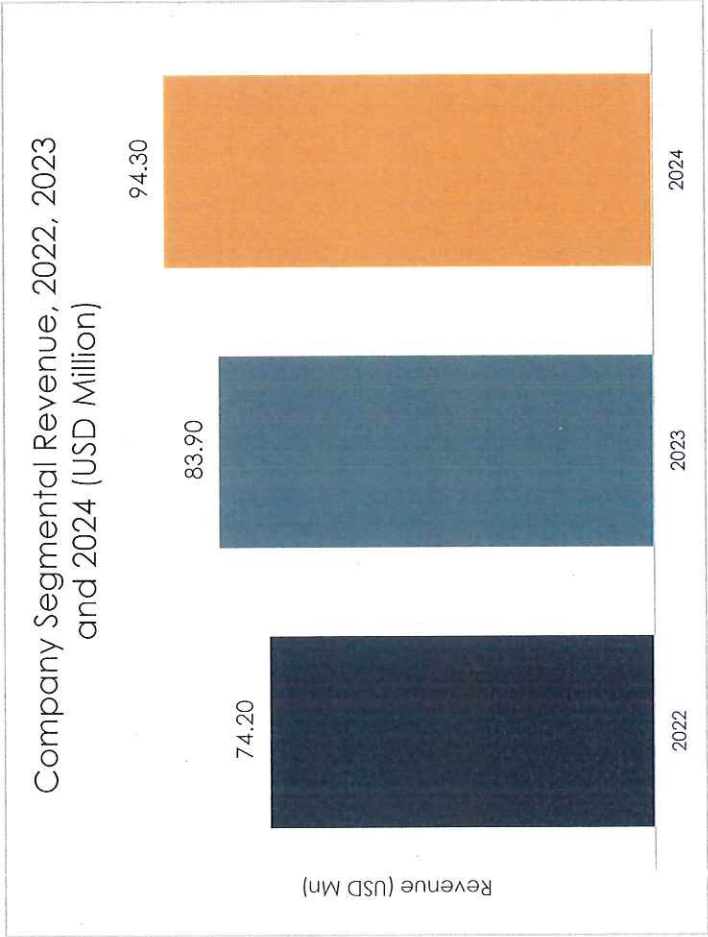
Contact Information

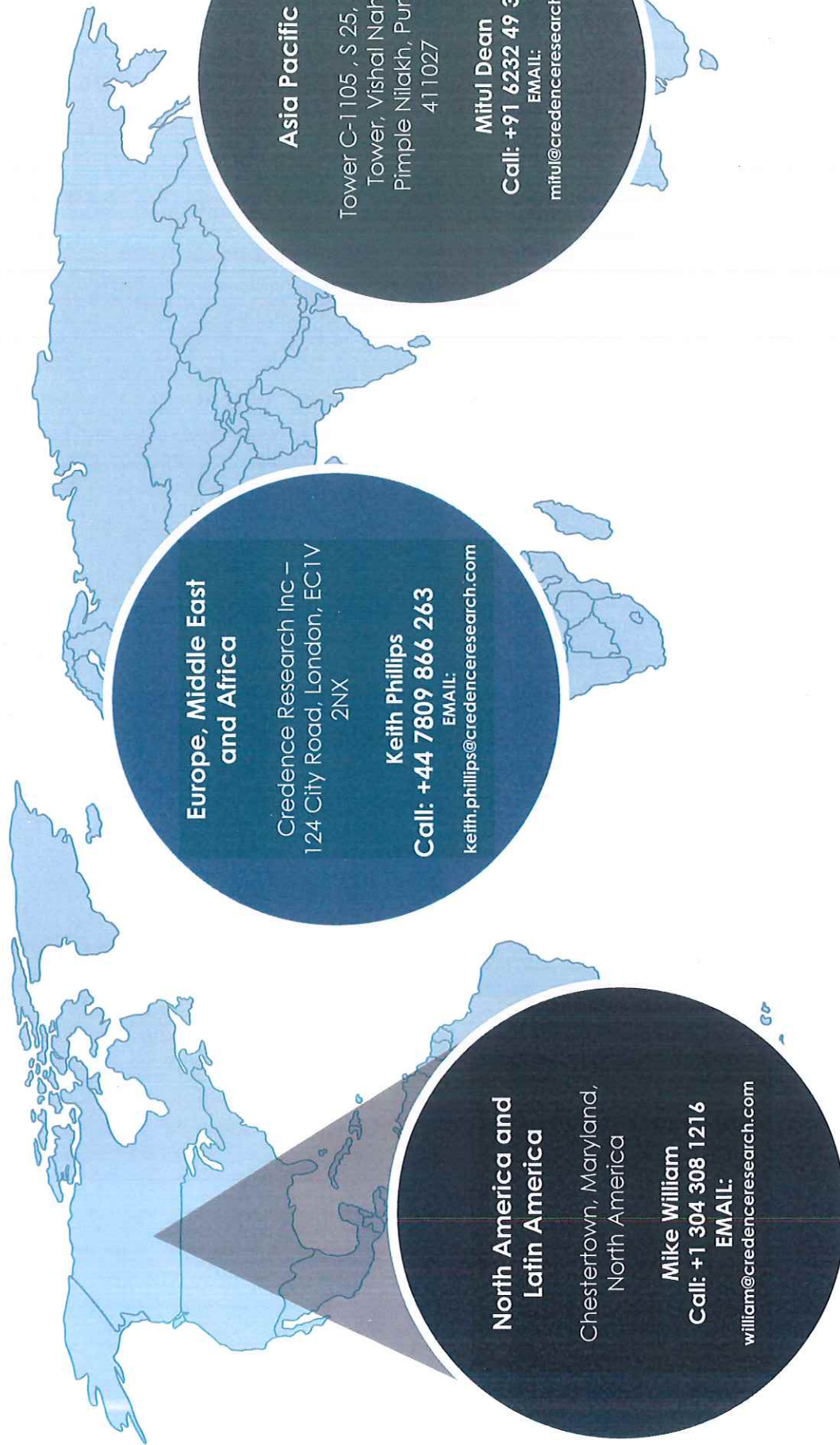
Plot No. A-70, MIDC, Malegaon,
Sinnar, Maharashtra, India,
422113
Phone: 022-6911-4400
Email: help@nobelhygiene.com

7.10.2. Product Portfolio

Product	Description
Teddy Baby Diapers	Soft, skin-friendly diapers designed specifically for babies. They are crafted to provide excellent absorbency to keep babies dry for extended hours, with features like leakage guards, comfortable fit for active movement, and breathable outer layers to reduce rashes. These diapers are suited to Indian climatic conditions and baby activity levels.
Teddy Diaper Pants (Pull-ups)	Pant-style, pull-up diapers that make it easy for toddlers and older infants to wear and move freely. They combine absorbent core material, stretchy waistbands, and leak protection to help parents manage nighttime or big-kids use more conveniently. They are designed to stay in place and handle more movement than traditional tape-style diapers.
Friends Adult Diapers	Disposable adult diapers meant for incontinence management. They include features such as odor control, high absorbency, adjustable fit, and discreet design focusing on comfort for elderly or mobility-impaired users. The materials are chosen for softness and skin safety.
Friends Adult Diaper Pants	Pull-on style adult “pants” designed similarly to baby pull-ups, for easier wearing and removal. They are developed to offer adult customers dignity, convenience, and reliable protection during the day and night. Elastic waist/stretch panels help reduce leakage and increase comfort while sitting or moving.
Wet Wipes	Gentle wet wipes offered by Nobel Hygiene are meant for everyday cleaning needs — for babies, hands, or general refreshment. They are formulated to be mildly fragrances or fragrance-free, with soft non-woven fabric to be gentle on skin. They are hygienically packaged to preserve freshness and usability.

7.10.3. Financial Overview





**North America and
Latin America**

Chestertown, Maryland,
North America

Mike William

Call: +1 304 308 1216

EMAIL:

william@credenceresearch.com

**Europe, Middle East
and Africa**

Credence Research Inc –
124 City Road, London, EC1V
2NX

Keith Phillips

Call: +44 7809 866 263

EMAIL:

keith.phillips@credenceresearch.com

Asia Pacific

Tower C-1105, S 25, Akash
Tower, Vishal Nahar,
Pimple Nilakh, Pune –
411027

Mitul Dean

Call: +91 6232 49 3207

EMAIL:

mitul@credenceresearch.com

Disclaimer

Any part of this report cannot be reproduced, kept in a retrieval system or transmitted in any kind by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publisher, Credence Research Inc.

The information and opinions in this report were prepared by Credence Research Inc. The information herein is believed to be reliable and has been obtained from public sources believed to be reliable. All info provided in this report is provided for information purposes solely.

The facts of this report are believed to be correct at the time of publication however cannot be assured. Please note that the judgments, conclusions and recommendations that Credence Research delivers can be based on information gathered in good faith from each primary and secondary sources, we have a tendency to be always in a position to ensure.

Research can initiate, update and cease coverage alone at the discretion of Credence Research Inc.

Credence Research Inc has no obligation to notify a recipient thereof within the event that any estimation, forecast, changes or subsequently becomes inaccurate.

As such Credence Research Inc will accept no liability whatever for actions taken based mostly on any information that could subsequently prove to be incorrect.

For purchase or any
enquiries, please contact
us at:



sales@credenceresearch.com

Address: Tower C-1105, S 25, Akash Tower,

Vishal Nahar, Pimple Nilakh, Pune – 411027

Phone: +91 6232493207