



Euromonitor
International

Nappies/Diapers/Pants in New Zealand

May 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Nappies/Diapers/Pants Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Kiddicare Gains Traction as Value Formats Outpace Premium Rivals

Chart 2 - Value Nappies Gain Momentum as Families Prioritise Affordability

Little Genie Drives Eco-Friendly Innovation to Meet Rising Demand

Chart 3 - Little Genie Expands Biodegradable Nappy Line with Compostable Packaging

Rascal & Friends Captures Digital Shoppers with Online-First Strategy

Chart 4 - Value Sales 2020-2030

Chart 5 - Volume Sales 2020-2030

Chart 6 - Value Sales by Category 2025

WHAT'S NEXT?

E-Commerce Platforms Reshape Nappy Purchasing as Parents Seek Convenience and Value

Eco-Friendly Innovations to Challenge Established Brands as Sustainability Becomes Mainstream

Disposable Pants to Outpace Nappies/Diapers as Demand for Convenience Drives Growth

Chart 7 - Analyst Insight for Nappies/Diapers/Pants

Chart 8 - Forecast Value Sales 2020-2030

Chart 9 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Rascals International Leverages Digital Channels to Narrow the Gap with Kimberly-Clark's Huggies

Chart 10 - Company Shares 2025

Chart 11 - Brand Shares 2025

CHANNELS

Supermarkets Retain Bulk Buyers as E-Commerce Accelerates Premium Shift

Online Platforms Reshape Value and Premium Shopping Habits

Chart 12 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 13 - Economic Context for Nappies/Diapers/Pants

Chart 14 - Real Gdp Growth 2020-2030

Chart 15 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 16 - Consumer Context for Nappies/Diapers/Pants

Chart 17 - Population 2020-2030

Chart 18 - Consumer Expenditure 2020-2030

Chart 19 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in New Zealand - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Woolworths and Foodstuffs Drive Value Shift as Shoppers Prioritise Essentials

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

Sorbent Leverages Premium Innovation to Sustain Value Despite Trading Down

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

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

Chart 23 - Value Sales 2020-2030

Chart 24 - Value Sales by Category 2025

WHAT'S NEXT?

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

Domestic Producers Will Gain Advantage as Sustainability Becomes Non-Negotiable

Chart 25 - Analyst Insight for Tissue and Hygiene

Ageing Population to Accelerate Growth in Adult Incontinence and Lifestyle Hygiene

Chart 26 - Forecast Value Sales 2020-2030

Chart 27 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

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

Chart 28 - Company Shares 2025

Chart 29 - Brand Shares 2025

CHANNELS

Supermarkets Strengthen Hold as Shoppers Seek Weekly Convenience

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

Chart 30 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 31 - Economic Context for Tissue and Hygiene

Chart 32 - Real Gdp Growth 2020-2030

Chart 33 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 34 - Consumer Context for Tissue and Hygiene

Chart 35 - Population 2020-2030

Chart 36 - Consumer Expenditure 2020-2030

Chart 37 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the

key markets, competitive environment and future outlook across a range of industries.

- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/nappies-diapers-pants-in-new-zealand/report.