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US Collection



Disposable Diapers: United States

January 2020



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About This Report

Scope

This report forecasts to 2023 US retail sales of disposable diapers and similar products in nominal US dollars and volume count. Total retail sales and volume count are segmented by type in terms of:

- pediatric diapers
- training underpants
- adult incontinence products

To illustrate historical trends, total retail sales, total volume count, and the various segments are provided in annual series from 2008 to 2018.

Bed and furniture protection pads, cleaners, creams, wipes, and incontinence-related paraphernalia such as bedpans are excluded from the scope of this report. Sales to the institutional market, such as hospitals and elder care providers, are also excluded.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Disposable Diapers: United States (FF15023) represents the synthesis and analysis of data from various secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- licensed national consumer survey data
- syndicated retail sales-tracking data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Disposable Diapers

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322121	Paper (except Newsprint) Mills	2621	Paper Mills
322291	Sanitary Paper Product Manufacturing	2676	Sanitary Paper Products
424130	Industrial and Personal Service Paper Merchant Wholesalers	5113	Industrial and Personal Service Paper
812331	Linen Supply	7219	Laundry and Garment Services, NEC

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market’s current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of

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determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Freedonia Industry Studies

Disposable Medical Supplies in the US

Global Disposable Medical Supplies

Global Nonwovens

Nonwovens Market in the US

Wipes

Freedonia Focus Reports

Contacts, Glasses, & Sunglasses: United States

Deathcare: United States

Demographics: United States

Education: United States

Global Healthcare

Global Nonwovens

Healthcare: United States

Medical Services: United States

Nonwovens: United States

Pharmaceuticals: United States

Freedonia Custom Research

Trade Publications

Chain Drug Review

Chain Store Age

Drug Store News

Mass Market Retailers

Nonwovens Industry

Progressive Grocer

Agencies & Associations

American Fiber Manufacturers Association

Association of the Nonwoven Fabrics Industry

Information Resources

National Association for Continenence

The Real Diaper Association

United States Census Bureau

United States Centers for Disease Control and Prevention

United States International Trade Commission