



OUTLOOK in INDIA—Global Absorbent Hygiene Products and Personal Care

EDANA holds dual events in New Delhi

By Helena Engqvist, *Contributor*

From January 18-20, 2023, EDANA and BCH (Business Co-ordination House) co-organized two conferences Outlook and Incontrol in New Delhi, India. The focus for Outlook was the global absorbent hygiene products market and a personal care conference focused on nonwovens and related materials. Incontrol, meanwhile, was a one-day global conference focused on infection prevention and new perspectives in the medical nonwovens field, medical applications and related materials.

Both events shared market indications, trends, innovations and important regulatory requirements with a focus on sustainability as a key driver in the market.

Outlook attracted 313 participants, representing 25 countries, and 35 exhibiting companies; Incontrol had 100 participants from eight countries and 11 exhibitor companies.

Business Co-ordination House, BCH, established in 2005, in New Delhi is the Indian association representing companies in technical textiles, nonwoven and composites by coordinating business activities and providing training events, seminars, market research and R&D. According to Ritika Gupta, executive director at BCH, growth of the various businesses in India is among potential benefits of BCH's work.

As publicly indicated, India is becoming the largest global nation by population. The growth in India has led to increasing hygiene product usage and awareness in social media, especially regarding baby diapers, feminine hygiene products and incontinence products. In the medical area hospitals are increasingly aware of single-use products, which are growing from a smaller base. Increasing medical tourism based on low cost leads to availability of the right stuff for human safety.

Other important aspects in all segments include regulatory aspects and sustainability.

Murat Dogru, general manager at EDANA, who joined the organization one year ago, discussed the importance of collaboration to the future of the nonwovens industry.

"I have seen exciting work at EDANA since almost one year and

collaborating with the team at EDANA," he says. "The future of our industry looks great and we are facing an amazing journey. Europe is a unique region and, while defining the worldmap, we also have global footprints such as India, China and other regions to consider."

EDANA is specifically focused on building strategies, challenges and expertise for the future, he adds.

"Our latest events Outlook and Incontrol in New Delhi, India, with our local partner Business Co-ordination House (BCH) introduced much information for the future trends, innovations and regulatory impact for products, nonwovens and other materials in the hygiene as well as medical markets industries," he says.

The presentations at the events provided honest open talks and discussions, shared important regulations, innovations and sustainability focused on the Indian market.

The Outlook Innovation Award

Innovations are considered very important for the future. The companies nominated for this year's Outlook Innovation Award, held in conjunction with the conference, were Sparkle Pads by Sparkle Eco Innovations, Technomelt advance series from Henkel and ElasTex Full-Stretch Pants from ElsssTec Suisse. Sparkle Eco Innovations Pvt. received the award largely due to its focus on sustainable products with biodegradable and compostable materials in sanitary pads.

Market Trends

As a keynote speaker at Outlook, EDANA chairman Mikael Staal Axelsen, CEO, Fibertex Personal Care, discussed how the nonwovens industry has demonstrated a commitment to sustainability by developing sustainable plastics and other materials for use in disposable products. Fibertex is a global specialist in spunmelt nonwovens and printed nonwovens for the hygiene industry, contributing to great products for better health, safety and quality of life. Like most nonwoven producers, the company is facing challenges such as plastic pollution and CO2 emissions. "We are

following the plastic directive and EPR, BioSource/Chemcycling/ and ISCC+. After all, it is our responsibility to make a change for the better," he says.

Changing Market Dynamics in India

According to Kanav Gupta, associate director at BCH, market dynamics for hygiene products in India are changing with increases in all the key segments—baby diapers, adult products, sanitary napkins and wet wipes. Driving this is domestic brands, which are emerging, growing and innovating. The market size of the absorbent hygiene industry of India is currently at \$4.37 billion in 2022 and is expected to increase to \$7.7 billion.

In addition, many nonwoven producers have increased their production in India.

In conclusion, the changing dynamics in the Indian hygiene market include OEM, adult diapers growth and e-commerce. Discovering sustainability and a constant move to quality.

By some local governments, the social procurement expectations from 2023 are increasing the number of free menstrual products for women.

The Development of the Baby Diaper Industry in China

Michael Wong at Jofo Nonwovens in China indicated that the Chinese consumer base is huge with options for increasing use and penetration as two-child and three-child policies have become a new growth driving force. The market shares of domestic brands are increasing while foreign brands have declined.

Product Innovations

- In India, Davide Nocciolini at Magis S.p.A. has introduced some facilitating alternative closure systems in adult diapers for key performance, cost and processing by adding two- or three-layer tapes which may lead to a general market development.
- Smart Care by digital incontinence management systems in elderly care was presented by Ulrich Wagner at Henkel with the advantage to provide smart care for incontinence products.
- Innovative product and machine designs enhance sustainability and cost savings as presented by Stefan Scheer at Winkler+Dünnebier Converting solutions by core competences in high-speed conversion and packaging of delicate web materials in the paper and hygiene industry. The improved production with less waste and quick size-changes generates benefits for both cost savings and sustainability. One example mentioned was how to improve thin absorbent products by using high-performance fluff. Another aspect was the comments about sustainable packaging.
- Luca Capriotti at Andritz Diatec shared how the nonwovens sustainable approach for hygiene products strategies for the Indian hygiene industry provides benefits and contributes to circular economy and the reduction of carbon footprint. The main

nonwoven technologies include spunbond, spunjet, air through bonded and spunlace combined with converting products.

The key benefits are the growing awareness of sustainability for all parties in the industry and state-of-the-art technologies. Furthermore, investments in recycling solutions can provide future benefits.

- Nordson by Vaibhav Modak in India, presented information about the optimized manufacturing of environmentally adhesive friendly materials used in combination with use of natural, recycled, biodegradable materials to produce eco-friendly products.
- Ari Tapani Borg at Suzano International introduced the new first fluff produced from eucalyptus in the world. The eucalyptus fluff has some improved rewet benefits in hygiene products. The fluff has been used in feminine hygiene products as well as some baby diapers.
- Gaurav Bathawal, co-founder at Niine in India shared that the Niine menstrual hygiene products were introduced in 2018 and were followed by baby diapers in the Indian market. The company focuses on a wide range of products as well as sustainability to meet consumer needs. And, on the world Menstrual Hygiene Day in 2018 Niine was launched into the market with the idea of changing the Indian Menstrual Hygiene landscape for the better.
- Chirag Virani, co-founder at Sparkle Eco Innovations in India and USA, discussed sustainability and circularity in the absorbent hygiene products industry with focus on biodegradability and compostability. The sustainability and environmental impacts include raw materials, product manufacturing, end-of-life scenarios and life cycle assessments (LCA) as key drivers and also facing the growing problem with plastic pollution.
- With the main focus on sustainability several companies have improved their actions, new processes and products.

An introduction about opportunities to create sustainable consumer loyalty in the period care market was presented by Rajasekaran Thangavel at Bostik in India. He shared the use of natural fibers in single-use sustainable products and some innovations about suitable adhesives.

By introducing improved sustainability of Wipes and AHP through raw material and functional innovations, Rahul Bansal at Birla in India, shared how regenerated cellulose combines the advantages of natural and plastic/synthetics. For sanitary napkins a topsheet which meets specific criteria can be used in a sanitary napkin with the Purocel viscose fibers.

To enable advanced recycling solutions for plastics, Jose Ruiz of ExxonMobil in Belgium, presented that plastics have end-of-life challenges that require scalable solutions. The plastics performance and sustainability performances impact waste recycling that can transform the chemical industry requiring innovative, scalable and circular solutions. In this context ExxonMobil has made progress to enable circular solutions with advanced recycling of plastic waste to help address plastic waste in the environment.

Product Safety

At EDANA, sharing the safety of absorbent hygiene products and consumer confidence is of utmost importance. Luminita Barbu, regulatory affairs director, shared insights about the product safety and regulatory landscape for hygiene products, legislation on product safety and the industry best practices that promote product safety. EDANA has provided safety and regulatory guidelines to support compliance with regulatory requirements. Other specialties is the EDANA Code of Practice for tampons and the Stewardship Program Codex analytical methods to ensure lack of trace chemicals in absorbent hygiene products.

A broad and holistic approach about safety in hygiene products was addressed by Cedric Schoorens at SGS in France. The aspects include testing and safety provision according to regulations and governance requirements, as well as product performances and user acceptance. Product components tests in line with the EDANA Codex.

Safety assessments of feminine hygiene products were addressed by Dr. Sachin More, Toxicology & Clinical Safety Department Johnson & Johnson Pvt. Ltd. in India, who provided insights about product safety including avoidance of toxicity, hazardous chemicals and components to ensure user safety assessments when using absorbent hygiene products.

At the end a panel discussion indicated the trends for a way forward in India.

The Outlook conference ended with much increased awareness about important aspects on absorbent hygiene products, used materials, sustainability, regulatory guidance and product safety and acceptance.

Incontrol Focuses on Infection Prevention

Incontrol, which was held in New Delhi, India, on January 20, was a global conference with focus on infection prevention and new perspectives for nonwovens in the medical field, wipes and indicated medical applications as well as related materials. The EDANA-sponsored event focused on trends, innovations, the Indian market development as well as safety and regulatory aspects.

At this event 100 people from eight countries participated and 11 companies exhibited.

Markets, Trends and Opportunities

The event began with a keynote speech presented by Kishore Khanna, MD of the Romsons Group Pvt. Ltd. in India. Khanna reported that the Indian medical device industry is the fourth largest in Asia and includes several types of medical devices. One important segment includes drapes and gowns in which disposable devices account for a 10% share and represent a market estimated at \$48.5-60.6 million. However, there has been strong growth of personal protective equipment kits because of Covid and there has also been a strong growth of domestic brands in the Indian medical devices industry, changing the scope of the market.

A presentation focused on standards and regulations for medical PPE in India was presented by AnilJauhri, ex-CEO at National

Accreditation Board for Certification Bodies in India. The standards and regulations have been increased by BIS, the Bureau of India Standards, which corresponds to BSI in the U.K., DIN in Germany and ANSI in the U.S., as well as often times aligned with international standards such as ISO and IEC. As India now is a major producer in the world, this means that the Ministry of Health (MoH) has based guidance of PPE on the WHO guidelines. There are currently numerous standards and regulations aligned with standards in the global markets.

The Medical Nonwoven Disposables in India and Opportunities was presented by Kanav Gupta, associate director at BCH in India. The medical textile industry in India includes medical disposables such as drapes, gowns, masks, shoe covers, surgical wraps, and medical PPE valued \$250 million in year 2000 and is expected to grow at 15% to reach \$503 million in 2032, Gupta reports. But, so far the market is dominated by reusables representing 80% of the market. The key drivers of the industry include surgeries for 1.4 billion people, as well as increasing awareness on infection prevention standards and legislations. However, the shift from reusables to disposables has gained increased government support in India based on post-Covid awareness on infections as well as increasing numbers of overall surgeries. There is an increasing number of hospitals and a change in a global disease burden.

Disposable Products

The importance of infection prevention with the use of Quality Medical disposables was shared by Dr. Neelam Sachdeva, sr. consultant and chief of Microbiology & CSSD Cum Infection Preventionist. To prevent infection in both single-use and reusable drapes and other products it is important to focus on sterilization and safe disposal. Infections caused by contaminations in health care settings may be related to touch, health professionals, patients, air-conditioning systems as well as water faucets and sinks. The entry and some infection agents may enter by patients own flora (10%) and from the environments from hands (80%). Another aspect is that fabrics surface porosity may cause adhesion of contaminations and pathogens. Consequently, cleaning and sanitizing as well as good quality is of utmost importance.

Global supply of disposable surgical gowns and drapes was shared by Amit Kumar, managing director, Surgeine Healthcare Pvt. Ltd. in India

The global market for disposable drapes and gowns is estimated at \$2.8 billion, of which India exports 0.18% of \$5 million. The question then is how can the country become a global supplier of disposable surgical gowns and drapes. The availability of quality raw materials such as SMS, SMMS, SMMMS, SSMMS fabrics, Bi-laminates and Tri-laminates, PE films and more need to follow international standards and regulations.

Additional presentations were given by Hemant Bhardwai, country manager, India & South Asia, O&M Halyard Health; Sameer S. Chitnis, Manjushree Spntek and Ralk Rosner, Reifenhauer Reicofil. ■