

Global Latex Condom Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 8.7 bn
Forecast (2031)	USD 13.3 bn
CAGR (2021-2031)	7.3%
Study period	2021-2031
Largest region	Asia-Pacific · 31.8%
Fastest-growing region	Middle East and Africa · 8.6%
Market concentration	Moderate
Licence	Individual / Company

The global latex condom market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by large addressable populations, expanding pharmacy and digital retail networks, and premium product adoption in China, India and Southeast Asia. Ultra-thin, textured and enhanced-lubrication products are raising category value, while institutional procurement remains critical to unit demand across lower-income markets. Manufacturers that combine certified high-volume production with localized sizing, discreet digital distribution and stronger consumer education will capture the leading growth pools.

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Executive summary

The global latex condom market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounted for XX% of 2025 revenue, supported by large addressable populations, expanding pharmacy and digital retail networks, and premium product adoption in China, India and Southeast Asia. Ultra-thin, textured and enhanced-lubrication products are raising category value, while institutional procurement remains critical to unit demand across lower-income markets. Manufacturers that combine certified high-volume production with localized sizing, discreet digital distribution and stronger consumer education will capture the leading growth pools.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global latex condom market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Market revenue will increase at a XX% CAGR between 2025 and 2031, adding USD XXX billion in annual value.
- Asia-Pacific led the market with XX% of 2025 revenue, equivalent to USD XXX billion.
- Ultra-thin latex condoms represented XX% of 2025 sales and are forecast to grow at an XX% CAGR through 2031.
- Online retail captured XX% of market value in 2025 and will grow at a XX% CAGR as discreet fulfillment and subscription purchasing broaden access.
- UNFPA reported delivery of XXX male condoms worldwide in 2024.
- UNFPA reported that male and female condoms supplied in 2024 prevented XXX sexually transmitted infections and XXX HIV infections.
- UNAIDS reported XXX new HIV infections in 2023 and identified declines of XX% to XX% in condom use across several surveyed countries.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Latex Condom Market Trends and Growth Drivers

Latex condoms occupy a distinctive intersection of consumer goods, regulated medical devices and public-health commodities. Demand is therefore shaped simultaneously by sexual behavior, reproductive-health policy, retailer execution, medical-device compliance and the economics of natural-rubber manufacturing.

The market's value engine is moving toward sensation, comfort and inclusivity. Ultra-thin films, better lubrication, differentiated textures and broader fit ranges allow brands to raise revenue per unit, while discreet online channels make specialized products easier to discover and repurchase.

Unit availability alone does not guarantee usage. The strongest markets combine dependable supply with comprehensive sexuality education, trusted brands, culturally relevant communication and low-friction purchasing; these capabilities determine whether demographic and epidemiological need converts into durable demand.

Growth drivers

Renewed STI-prevention investment

Persistently high HIV and STI incidence is returning condom availability and demand generation to public-health agendas. Procurement agencies, ministries of health and social-marketing organizations translate programme funding into large-volume orders, particularly across sub-Saharan Africa and South Asia.

Premium ultra-thin innovation

Improved latex compounding and dipping controls allow producers to reduce film thickness while maintaining burst and tensile performance. Ultra-thin, high-lubrication and sensation-led products command higher revenue per unit and attract consumers who cite reduced sensation as a barrier to use.

Discreet digital distribution

E-commerce removes purchase embarrassment, expands assortment beyond store shelf constraints and enables repeat ordering. Marketplaces, quick-commerce platforms and brand-owned subscriptions are particularly effective among urban adults and consumers seeking specialty sizes or variants.

Emerging-market retail expansion

Modern pharmacies, convenience chains and digital payments are extending commercial access across India, Indonesia, Vietnam, Nigeria and other high-population markets. Smaller packs keep entry prices accessible while rising incomes support migration into branded mid-tier and premium variants.

Institutional procurement scale

UN agencies, governments and NGOs anchor baseline unit demand and support access where private retail penetration is weak. Multi-year tenders reward manufacturers with certified facilities, dependable raw-material sourcing and the ability to produce customized foils and programme brands.

Sexual-wellness normalization

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More inclusive education and brand communication are repositioning condoms from a purely clinical product toward an intimacy and wellbeing purchase. This expands female participation in purchase decisions and supports products built around comfort, lubrication, fit and shared experience.

Automated quality control

High-speed electronic testing, automated foil packing and process analytics reduce rejection rates and improve production consistency. Scale efficiencies allow certified manufacturers to serve both price-sensitive tenders and higher-margin branded portfolios from the same manufacturing base.

Restraints

Falling use in priority populations

Condom use has weakened among young people in several high-HIV-burden markets as prevention campaigns and social-marketing activity have lost reach. Lower risk perception and inconsistent comprehensive sexuality education reduce category recruitment despite continuing clinical need.

Alternative prevention and contraception

Long-acting reversible contraception, oral contraceptives and biomedical HIV-prevention options compete with condoms for specific use cases. Condoms retain the combined STI and pregnancy-prevention proposition, but category messaging must increasingly explain their complementary role.

Latex input volatility

Natural-rubber prices, plantation yields, weather conditions and currency movements affect material costs and working capital. Value-tier and institutional contracts have limited repricing flexibility, placing disproportionate pressure on producers without integrated sourcing or scale.

Stigma and advertising constraints

Cultural resistance, age restrictions and limits on sexual-content advertising constrain consumer education and brand-building in several markets. The effect is strongest outside major cities, where discreet retail access and reliable product information are also less developed.

Registration and certification burden

Latex condoms are regulated medical devices and require performance documentation, quality systems, labeling compliance and market authorization. Re-certification, notified-body review and tender prequalification extend launch timelines and favor established manufacturers.

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Latex Condom Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Renewed STI-prevention investment	XXX	XXX	XXX
Premium ultra-thin innovation	XXX	XXX	XXX
Discreet digital distribution	XXX	XXX	XXX
Emerging-market retail expansion	XXX	XXX	XXX
Institutional procurement scale	XXX	XXX	XXX
Sexual-wellness normalization	XXX	XXX	XXX
Automated quality control	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Falling use in priority populations	XXX	XXX	XXX
Alternative prevention and contraception	XXX	XXX	XXX
Latex input volatility	XXX	XXX	XXX
Stigma and advertising constraints	XXX	XXX	XXX
Registration and certification burden	XXX	XXX	XXX

Source: XXX

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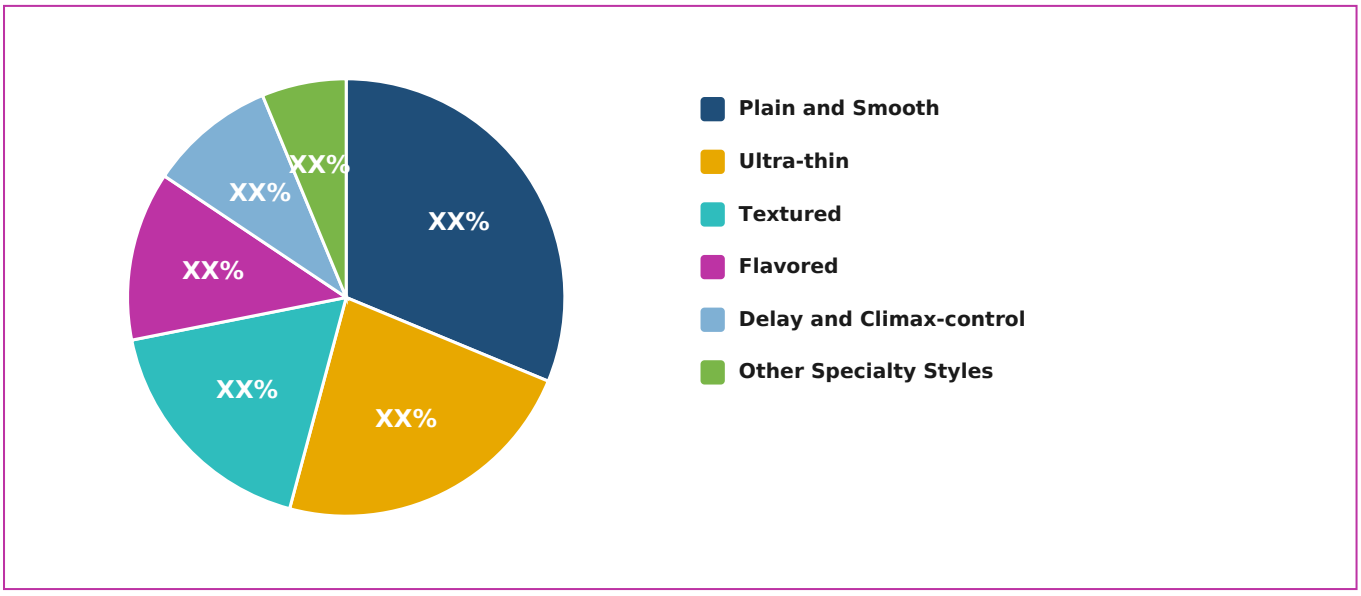
Latex Condom Market Segmentation Analysis by Product, Pack, Channel and Buyer

By Product Style

Plain lubricated condoms retain the largest share because they anchor value-tier retail, institutional tenders and multipack demand. Ultra-thin products are the most important premium growth engine as improved compounding and dipping precision narrow the perceived sensation gap. Textured and enhanced-lubrication products broaden use occasions, while delay and specialty variants remain smaller but high-value niches.

Value share by product Style, 2025



Source: XXX

Value by product Style, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Plain and Smooth	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ultra-thin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textured	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flavored	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Delay and Climax-control	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Specialty Styles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Pack Size

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The 4-10 unit format dominates pharmacies, convenience stores and trial purchases because it offers manageable spend and adequate brand visibility. Packs of 11-20 units perform strongly in supermarkets and online channels, while bulk packs of 21 or more units benefit from subscriptions, repeat users and institutional purchasing. Small packs remain essential for affordability and consumer recruitment in lower-income markets.

Value by pack Size, USD bn

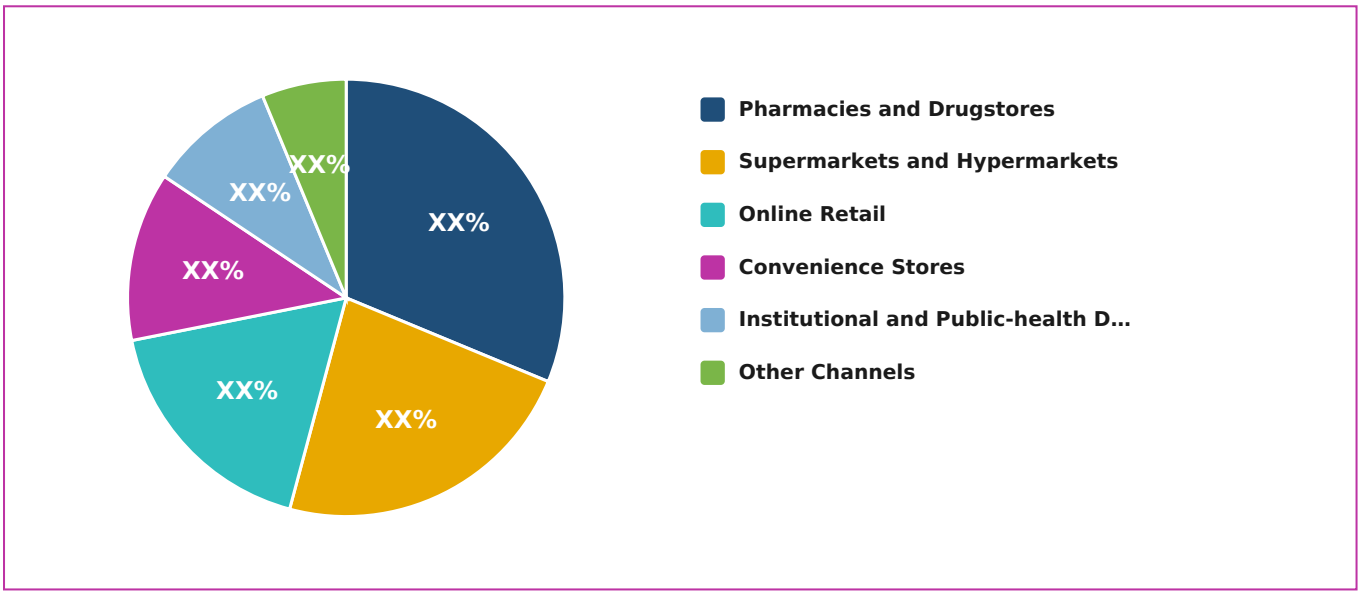
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
1-3 Units	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4-10 Units	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
11-20 Units	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
21 Units and Above	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Pharmacies lead through trust, health-category adjacency and broad geographic coverage. Supermarkets and convenience stores serve planned and immediate purchases, but shelf-space constraints limit assortment. Online retail is gaining share through privacy, broader size and style selection, subscription functionality and rapid delivery.

Value share by distribution Channel, 2025



Source: XXX

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Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Pharmacies and Drugstores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Institutional and Public-health Distribution	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Price Tier

Mid-tier brands combine recognized quality with accessible pricing and therefore capture the widest commercial audience. Value products dominate many tenders and price-sensitive retail markets but face tight margins. Premium growth is led by ultra-thin construction, advanced lubrication, specialty fit, high-end packaging and Japanese-style technology positioning.

Value by price Tier, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Value	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mid-tier	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Premium	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Buyer Group

Consumer retail dominates value because branded packs carry higher prices than institutional products. Government and multilateral procurement provide predictable volume and support access in countries with weak commercial coverage. NGOs and social-marketing organizations bridge the two models by combining subsidized pricing with branded demand-generation campaigns.

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Value by buyer Group, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Consumer Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Government and Multilateral Procurement	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
NGO and Social-marketing Programmes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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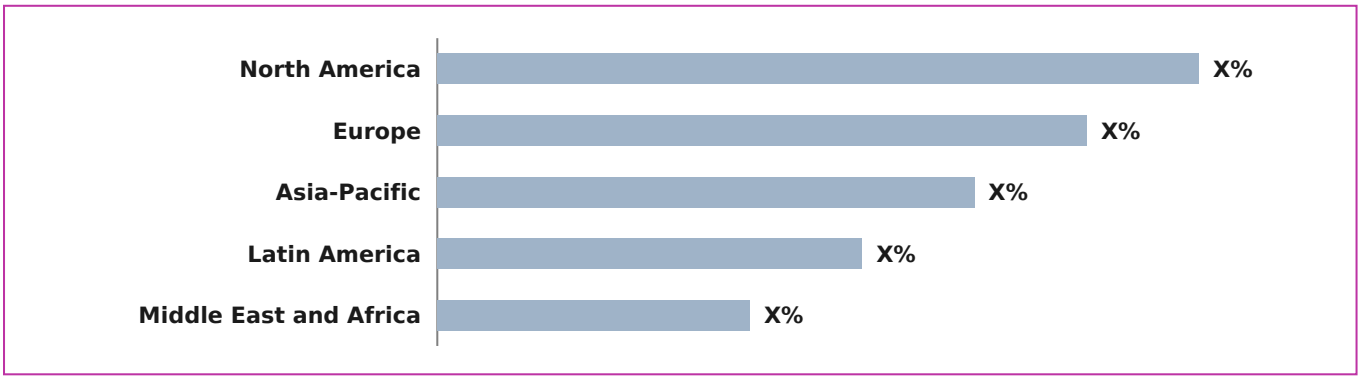
Latex Condom Market Regional Analysis and Country Outlook

Asia-Pacific generated USD XXX billion, or XX% of global latex condom revenue, in 2025. China supplies the region's largest premium value pool, while India contributes a high-volume branded market led by pharmacies, general trade and rapidly expanding e-commerce. Japan remains a technology benchmark for thin-film products, and Southeast Asia combines major export manufacturing capacity with rising domestic demand.

Europe held XX% of 2025 revenue, supported by high branded-product penetration, developed pharmacy and supermarket channels, and strong demand for thin and enhanced-lubrication variants. Germany, the United Kingdom and France are the principal commercial markets, while compliance with Regulation (EU) 2017/745 and Class IIb conformity requirements shapes portfolio renewal and supplier economics.

Middle East and Africa will record the fastest regional CAGR at XX% through 2031. Growth is driven by population expansion, HIV-prevention requirements, donor and government procurement, and wider pharmacy access; South Africa, Nigeria and Kenya are the leading addressable markets. North America remains a premium, concentrated market where Trojan and major retail platforms influence pricing, although non-latex innovation creates stronger material substitution pressure than in other regions.

Growth rate by region, 2025-2031



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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Latex Condom Market Competitive Landscape and Company Share

The latex condom market has moderate concentration: global brands control premium shelf space, while large Asian original-equipment manufacturers supply branded, private-label and institutional customers. Durex has the broadest international consumer footprint, Trojan leads the United States, and Okamoto, Sagami, SKYN/Lifestyles, Manforce, Moods and ONE hold strong positions in selected markets or product niches.

Competition is shifting from basic lubrication and flavor extensions toward thinner films, differentiated lubricants, inclusive sizing and discreet digital merchandising. Reckitt's Durex innovation platform has strengthened its premium position in China and Europe, while Church & Dwight and Japanese producers are investing in advanced non-latex products that also pressure the premium latex tier. Latex suppliers are responding with softer compounds, greater lubrication, better fit and sharper price-performance.

Manufacturing scale remains strategically important. Karex reports capacity above XXX condoms annually and combines contract manufacturing with proprietary brands, while other Malaysian, Thai, Indian and Chinese manufacturers compete for institutional tenders and private-label programmes. Future consolidation will center on regulatory credentials, access to automated capacity, sustainable rubber sourcing and control of direct consumer relationships.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Reckitt Benckiser Group plc	XXX	XXX	XXX	XXX
Church & Dwight Co., Inc.	XXX	XXX	XXX	XXX
Karex Berhad	XXX	XXX	XXX	XXX
Okamoto Industries, Inc.	XXX	XXX	XXX	XXX
LifeStyles Healthcare Pte. Ltd.	XXX	XXX	XXX	XXX
Sagami Rubber Industries Co., Ltd.	XXX	XXX	XXX	XXX
Mankind Pharma Limited	XXX	XXX	XXX	XXX
HLL Lifecare Limited	XXX	XXX	XXX	XXX
Cupid Limited	XXX	XXX	XXX	XXX
Thai Nippon Rubber Industry Public Company Limited	XXX	XXX	XXX	XXX

Source: XXX

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Latex Condom Market Forecast, Investment Priorities and Opportunities

Global latex condom revenue will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain strongest in public-health and emerging-market channels, while mix improvement from ultra-thin, textured and enhanced-lubrication formats will generate a disproportionate share of value growth.

The central forecast assumes continued retail formalization, stable institutional procurement and sustained premium innovation. Stronger condom-programme funding and comprehensive sexuality education would accelerate unit demand, while prolonged cuts to prevention budgets or faster substitution toward alternative materials would moderate growth. Latex will remain the dominant condom material because of its elasticity, established standards, manufacturing scale and accessible price points.

Winning suppliers will segment portfolios more precisely by fit, sensation, lubrication and use occasion rather than relying on flavor proliferation alone. Investments in electronic quality testing, lower-energy production, certified natural-rubber supply and localized digital campaigns will improve tender eligibility, brand trust and margins through 2031.

Opportunities

- Localized sizing and anatomically fitted latex products
- Women-centered packaging, lubrication and communication
- Direct-to-consumer subscriptions and personalized variety packs
- Certified sustainable natural-rubber sourcing
- Domestic production partnerships in high-import-dependence markets
- Institutional supply contracts linked to HIV and family-planning programmes
- Affordable ultra-thin products for middle-income consumers

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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