

Feminine Hygiene and Sanitary Protection Products - UK - July 2009

Report Price: £1500 / \$3000 / €2250

What is this report about?

Key issues covered in the analysis

- The feminine hygiene product market is worth an estimated £298 million in 2009, following sluggish growth of 11% between 2004 and 2009. This is mainly due to a growing older female demographic and increased efficiency and absorbency in products which has made a need for fewer products. There is, however, scope to grow sales by targeting pregnant women (sanitary protection market loses over £990,000 annually, due to a growth in pregnancies) with panty liners, intimate wipes, washes and deodorants tailored to their needs.
- Despite the UK's ageing population, the proportion of women using sanitary protection products in the last 12 months grew from 17 million women in 2004 to 18 million in 2008. The growing consumer base will help protect the £298 million market from the heavy price promotions threatening to erode market value and bringing down average per capita spend.
- The growth in the older end of the age spectrum means opportunities for the industry to target these consumers with age-related problem-specific products, such as innovating in wipes that could help cool after or during a hot flush, or smaller packs of sanitary protection products.
- Women have become accustomed to high levels of absorbency as a basic element of feminine hygiene, and as a result, they are increasingly responding to premium features such as style and lifestyle choice in their purchasing. Expectations in standards of hygiene continue to escalate, allowing manufacturers ample opportunity to add a premium on added hygiene features.
- The use of tampon declines less than towels between the ages of 25-34 and 35-44. This suggests that this is the age when women switch to tampons instead of towels. And, as tampons typically retail at between 9p and 17p per item; whilst towels tend to be cheaper, at between 4p and 15p per towel - encouraging women to switch to tampons sooner could help grow this market.
- Almost three in ten sanitary protection users (28%) are price-conscious; buying when they see products on special offer (ie stockpiling), buying whatever is on special offer or switching brands in order to save money. There is scope here for manufacturers to



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promote brand loyalty and create excitement around a brand, by offering women a year's supply of sanitary protection if they collect on-pack tokens. Or perhaps attach free gifts to products to help promote the brand, such as a sample of an indulgent bubble bath for example.

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Scope of the report