

Sexual Health - UK - August 2013

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“As women take more control of their contraception, there is much more the market can do to better target this demographic. As the baby boom continues, and with the rise of the over-50s, the market could see a boost in value from new parents and ‘silver separators’”

– Roshida Khanom, OTC & Personal Care Analyst

In this report we answer the key questions:

- How will changing population dynamics impact the market?
- Why are people still having unprotected sex?
- How can the market better target women?
- What role will own-label play in this category?

The condom and female lubrication market has seen growth of 3% in 2012, which is predicted to continue in 2013. Growth has been, and will continue to be, driven by the condom market, which grew in value by 5% in 2012 largely contributed by a rise in the average price per unit. As the global price of latex, a raw material of condoms, continues to be volatile (showing a rise in price in recent years) this will continue to impact the price of condoms in the market. The female lubrication market however, has fallen in value by 2% in 2012, and unless product innovation picks up (as well as more reassuring communication to women on the safety of using such products) the market is likely to continue to see decline.

The condom market is also likely to benefit from changes in the population. As couples with children between the ages of 0 to 4 are most likely to use condoms, the baby boom will boost the category. Additionally, with the rise in population of the over-55s and those divorcing over the age of 60, it's likely that a great number of older people will be on the dating scene. This is set to offer opportunities for the market to better cater to this demographic. Women are also another demographic which can be better targeted by manufacturers as they take more control of their contraception and are more likely to use condoms in a new relationship. Education is a key feature for young adults, with the rising rate of STI/STDs among young people and young people feeling less informed about safe sex and STI/STDs.

For the purposes of this report, female lubrication has been included in the market sizing data but is excluded from all other aspects of the report. Female lubrication includes medicated lubricants as well as lubricants designed to enhance sexual pleasure. The primary focus of this report is the condom market.

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