

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Risk factors are growing among younger consumers
- Many women still use period products for incontinence



"The US incontinence market grew based on an acceleration of the same growth drivers that were prominent in 2018, such as a transition from period products to dedicated incontinence products, the continued aging of the population and growing bladder leakage due to lifestyle issues."

-Jamie Rosenberg, Senior Global Analyst, Household & Personal Care

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

Market overview

Figure 1: Total US sales and fan chart forecast of incontinence products, at current prices, 2014-24

- The issues
- Risk factors are growing among younger consumers
 - Figure 2: Obesity trends in the US, 2000 2016
 - Figure 3: Incontinence can be improved with lifestyle changes, by age, October 2019
- Many women still use period products for incontinence
 - Figure 4: Use of period products vs incontinence products for bladder leakage, August 2018 and October 2019
 - Figure 5: Feminine hygiene products protect against bladder leakage, October 2019
- The opportunities
- Multi-fluid products could be pivotal

Figure 6: Interest in multi-fluid pads, by age, October 2019

 Implantable and wearable devices present an appealing alternative

Figure 7: Interest in implantable bladder devices, by 25-34 age group, August 2018 and October 2019

- Ecommerce presents a strong opportunity
 - Figure 8: Online purchases of incontinence products, August 2018 and October 2019
- What's Next: A view toward 2030
- The Cost of Longevity
- Disruptive Devices

THE MARKET – WHAT YOU NEED TO KNOW

- Strong growth prospects ahead
- The category is diversifying for different needs
- American lifestyles contribute to bladder leakage

MARKET SIZE AND FORECAST

Strong growth prospects ahead

Figure 9: Total US sales and fan chart forecast of incontinence products, at current prices, 2014-24

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 10: Total US sales and forecast of incontinence products, at current prices, 2014-24

MARKET BREAKDOWN

The category is diversifying for different needs

Figure 11: Multi-outlet sales of select adult incontinence products, by leading brands, rolling 52 weeks 2019

Mass merchandisers dominate

Figure 12: Total US retail sales of adult incontinence products, by channel, at current prices, 2017 and 2019

MARKET PERSPECTIVE

 Skincare, sleep and sexual health will provide domain expansion opportunities

MARKET FACTORS

American lifestyles contribute to bladder leakage

Figure 13: Incontinence can be improved with lifestyle changes, by age, October 2019
Figure 14: Obesity trends in the US, 2000 - 2016

KEY PLAYERS - WHAT YOU NEED TO KNOW

- · Light bladder leakage is still the key growth driver
- Tena products gain ground in the US
- Depend Flex-Fit continues its run
- Incontinence goes natural
- Poise Impressa sales slide
- Multi-fluid products could be the future
- The incontinence category develops a sport focus
- Bladder fullness products could enhance discretion

COMPANY AND BRAND SALES OF INCONTINENCE PRODUCTS

Light bladder leakage is still the key growth driver

Figure 15: Multi-outlet sales of adult incontinence products, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 16: Feminine hygiene products protect against bladder leakage – any agree, October 2019

WHAT'S WORKING

- Tena products gain ground in the US
- Depend Flex-Fit continues its run
- Better absorbent cores drive thinner products and reduce costs

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Incontinence goes natural

WHAT'S STRUGGLING

Poise Impressa sales slide

Figure 17: Interest in implantable bladder devices, by 25-34 age group, August 2018 and October 2019

WHAT TO WATCH

Multi-fluid products could be the future

Figure 18: Interest in multi-fluid pads – any agree, by age, October 2019

The incontinence category develops a sport focus

Figure 19: Sports or strenuous activity as cause of incontinence, by age, October 2019

- Bladder fullness products could enhance discretion
- Kegel fitness devices could reduce reliance on absorbent products

THE CONSUMER - WHAT YOU NEED TO KNOW

- Incidence of heavy incontinence increases
- Use of implantable bladder support devices grows
- Growing obesity makes weight-based incontinence more prevalent
- · Childbirth is a key risk factor
- · Exercise is healthy, but still causes bladder leakage
- Online sales grow
- More consumers perceive their incontinence as unmanageable
- The industry is on the right track in addressing emotional issues

INCONTINENCE EXPERIENCE

• The incidence of heavy incontinence increases

Figure 20: Incontinence experience, October 2019

· Childbirth is a key risk factor

Figure 21: Incontinence Experience, by age of children, October 2019

PRODUCT USAGE

Fewer consumers are using period products for incontinence

Figure 22: Use of period products vs incontinence products for bladder leakage, August 2018 and October 2019

· Better male-specific products will drive growth

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 23: Incontinence products used, October 2019

Use of implantable bladder support devices grows

Figure 24: Usage of implantable bladder support devices, by age, October 2019

CAUSES OF INCONTINENCE

Age is the single biggest factor

Figure 25: Causes of incontinence, October 2019

 Growing obesity makes weight-based incontinence more prevalent

Figure 26: Weight gain as a cause of incontinence, by age, October 2019

• Exercise is healthy, but still causes bladder leakage

Figure 27: Sports as cause of incontinence, by age, October 2010

PURCHASE LOCATIONS

Online sales grow

Figure 28: Online purchases of incontinence products, August 2018 vs October 2019

Younger consumers are turning to ecommerce

Figure 29: Online purchase of incontinence products, by age, October 2019

 Mass merchandisers and drug stores are still the dominant channels.

Figure 30: Purchase locations, October 2019

ATTITUDES TOWARD INCONTINENCE

 More consumers perceive their incontinence as unmanageable

Figure 31: Lifestyle disruption from incontinence, August 2018 and October 2019

Younger consumers perceive a greater lifestyle disruption

Figure 32: Perception of the effect of incontinence on quality of life, by age, October 2019

 Consider how young people with incontinence are viewed by their peers

Figure 33: Select attitudes toward incontinence – strongly agree, by age, October 2019

The industry is on the right track in addressing emotional issues

Figure 34: Attitudes toward incontinence products – Any agree/disagree, October 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



 Younger consumers are more open despite greater embarrassment

Figure 35: Open about bladder issues, by age, October 2019

APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Fan chart forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE MARKET

Figure 36: Total US retail sales and forecast of adult incontinence products, at inflation-adjusted prices, 2014-24

APPENDIX - RETAIL CHANNELS

Figure 37: Total US retail sales of adult incontinence products, by channel, at current prices, 2014-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.