

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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



Growth of the overall feminine care products market has been marginal in recent years, as it faces several challenges. Women are having fewer, lighter periods, contributing to declining usage of sanitary protection, specifically tampons.

This report looks at the following areas:

- Sales of sanitary protection products stagnate
- More women experience bladder issues than use incontinence-specific products
- Concerns over the safety of feminine care products

An aging population and increased interest in cleansing products bodes well for the adult incontinence and feminine hygiene segments of the category. Discussions about menstruation and bladder leakage are also becoming less taboo, empowering women to discover solutions for their feminine care needs.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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

The issues

Sales of sanitary protection products stagnate

Figure 1: MULO sales of sanitary protection products, 2010-20

More women experience bladder issues than use incontinence-specific products

Figure 2: Bladder leakage experience, January 2016

Concerns over the safety of feminine care products

Figure 3: Attitudes toward sanitary protection and feminine hygiene products, January 2016

The opportunities

Adult incontinence products have an opportunity to target younger women

Figure 4: Agreement incontinence products are not for someone my age, by age, January 2016

Bladder support products offer women additional bladder control options

Figure 5: Interest in trying a bladder support product, by age, incontinence product user, and bladder leakage experience, January 2016

Opportunity to improve communication about feminine hygiene products

Figure 6: Feminine hygiene product use, January 2016

What it means

The Market – What You Need to Know

Feminine care market sustains steady increases

Market growth is driven by adult incontinence products

Contraceptive and soap/bodywash use impacts feminine care market

The female population, race, and birthrates influence the market

Market Size and Forecast

Feminine care market maintains steady growth

Figure 7: Total US sales and fan chart forecast of feminine hygiene and sanitary protection products, at current prices, 2010-20

Figure 8: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2010-20

Market Breakdown

Market growth is fueled by adult incontinence products

Figure 9: Sales and forecast of feminine hygiene and sanitary protection products, by segment, 2010-20

The majority of purchases are made at "other" retailers

Figure 10: Total US retail sales of feminine hygiene and sanitary protection products, by channel, at current prices, 2015

Market Perspective

Women's contraceptive use impacts the feminine care market

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 11: Uses contraceptives for birth control, by female, April 2015

Most women use regular soap, competing with feminine washes

Market Factors

Population of menstruating women stagnates; aging population grows

Figure 12: US female population, by age, 2011-21

Figure 13: US population among 65+ year old adults, 2011-21

Change in racial/ethnic demographics impact on market

Figure 14: US female population, by race and Hispanic origin, 2011-21

Birthrates starting to trend back up

Figure 15: US annual births, 2004-14

Key Players – What You Need to Know

Procter & Gamble is the leader in feminine care

Adult incontinence and feminine hygiene sales grow

Sales of sanitary protection products remain nearly flat

Safety concerns, taboos, taxes, and innovation shaking up the feminine care market

Manufacturer Sales of Feminine Hygiene and Sanitary Protection Products

Procter & Gamble takes top spot due to new incontinence line

Figure 16: MULO sales of feminine hygiene and sanitary protection products, by leading companies, rolling 52 weeks 2014 and 2015

What's Working?

Adult incontinence products

Figure 17: Share of feminine care product launches, by subcategory, 2011-15

Figure 18: MULO sales of adult incontinence, by leading companies and brands, rolling 52 weeks 2014 and 2015

Feminine hygiene products have notable growth

Figure 19: Share of MULO sales of feminine hygiene, by overall categories, rolling 52 weeks 2014 and 2015

Figure 20: MULO sales of select feminine hygiene products, by leading brands, rolling 52 weeks 2014 and 2015

What's Struggling?

Sales of pads and liners remains flat

Figure 21: MULO sales of sanitary napkins/liners, by leading companies and brands, rolling 52 weeks 2014 and 2015

Leading tampon brands experience minimal growth

Figure 22: MULO sales of tampons, by leading companies and brands, rolling 52 weeks 2014 and 2015

What's Next?

Amid concerns of safety The Honest Company joins the sanitary protection product market

Take the taboo out of menstruation and incontinence

Backlash over the "luxury" tax on feminine sanitary protection products

Poise's Impressa, an OTC bladder support, succeeding in the market

Real underwear for periods and bladder leakage

The Consumer – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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

- More than half of women are currently menstruating
- Most women use sanitary protection products, some use feminine hygiene products
- Nearly half of women experience bladder leakage
- One quarter of women use incontinence products
- Feminine care products evoke specific needs
- Some women express concern with chemicals in sanitary protection products
- Women are receptive to the benefits of feminine hygiene products
- Incontinence products are easy to find; yet embarrassing to purchase

Menstruation Experience

- More than half of women are currently menstruating
Figure 23: Menstruation experience, January 2016
- Age drives menstruation
Figure 24: Menstruation experience, by age, January 2016
- Hispanic women have the highest incidence of current menstruation
Figure 25: Menstruation experience, by Hispanic origin and race, January 2016
- Many who menstruate also experience bladder leakage
Figure 26: Bladder leakage experience, by women currently menstruating, January 2016

Sanitary Protection and Hygiene Product Use

- Nearly three fourths of women are using sanitary protection products
Figure 27: Sanitary protection product use, January 2016
- Profile of sanitary protection product users
Figure 28: Sanitary protection product use, by age, Hispanic origin and race, and menstruation status, January 2016
- About two out of five women use a feminine hygiene product
Figure 29: Feminine hygiene product use, January 2016
- Profile of feminine hygiene product users
Figure 30: Feminine hygiene product use, by age, Hispanic origin and race, and product user type, January 2016

Bladder Leakage Experience

- Nearly half of women experience bladder leakage
Figure 31: Bladder leakage experience, January 2016
- Age knows no boundaries for bladder leakage
Figure 32: Bladder leakage experience, by age, January 2016
- Moms are susceptible to bladder issues
Figure 33: Bladder leakage experience, by parental status, January 2016
- Hispanic women report experiencing bladder leakage most
Figure 34: Bladder leakage experience, by Hispanic origin and race, January 2016

Adult Incontinence Product Use

- One quarter of women use incontinence products
Figure 35: Adult incontinence product use, January 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: 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 |
 EMAIL: reports@mintel.com

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Profile of adult incontinence product users

Figure 36: Adult incontinence product use, by age, Hispanic origin, race, number of children, and bladder leakage experience, January 2016

Feminine Care Product Usage Occasions

Feminine care products evoke specific needs

Figure 37: Correspondence Analysis, product usage occasions, January 2016

Panty liners meet several needs

Figure 38: Panty liners product usage for menstruation occasions, by age, January 2016

Figure 39: Panty Liners product usage for other occasions, by age, menstruation experience, and bladder leakage experience, January 2016

Sanitary pads are for heavy flow days and preparation

Figure 40: Sanitary pad product usage occasions, by currently menstruating and bladder leakage experience, January 2016

Women use tampons when menstrual flow is heaviest

Figure 41: Tampon usage occasions, January 2016

Feminine hygiene products considered part of a daily routine

Figure 42: Feminine hygiene product usage occasions, by all and currently menstruating, January 2016

Incontinence products are for bladder leakage and used often

Figure 43: Incontinence product usage occasions, by age and bladder leakage experience, January 2016

Attitudes toward Sanitary Protection Products

Women purchase sanitary protection products on autopilot

Figure 44: Sanitary protection product brand attitudes, January 2016

Health-conscious ingredients and materials have appeal

Figure 45: Agreement with attitudes toward sanitary protection product materials, January 2016

Offer women choices

Figure 46: Agreement with attitudes toward sanitary protection product materials, by older Millennials, Hispanic origin, urban dweller, mothers of children under 18, January 2016

Women aged 25-34 are most aware of the alternatives

Figure 47: Agreement with awareness of alternative sanitary protection product materials, by age, January 2016

Attitudes toward Feminine Hygiene Products

Women are receptive to the benefits of feminine hygiene products

Figure 48: Agreement with perceptions of feminine hygiene products, by age, Hispanic origin, January 2016

Some concern does surround the safety of these products

Figure 49: Agreement with natural perceptions of feminine hygiene products, by age, January 2016

Feminine hygiene products are easy for women to find

Figure 50: Agreement with locating feminine hygiene products, by age, January 2016

Attitudes toward Adult Incontinence Products

Incontinence products are easy to find; yet embarrassing to purchase

Figure 51: Agreement with locating incontinence products, by age and incontinence product users, January 2016

For one third of women age impacts acceptability

Figure 52: Agreement incontinence products are not for someone my age, by age, January 2016

Women are using sanitary protection products for bladder leakage

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: 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 |
 EMAIL: reports@mintel.com

Feminine Hygiene and Sanitary Protection Products - US - March 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 53: Agreement with incontinence products usage occasions, by product user and bladder leakage experience, January 2016

Bladder support products have appeal

Figure 54: Interest in trying a bladder support product, by age, incontinence product user and bladder leakage experience, January 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 55: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at inflation-adjusted prices, 2010-20

Figure 56: Total US retail sales and forecast of feminine hygiene and sanitary protection products, by segment, at current prices, 2010-20

Figure 57: US female population, by age, 2011-21

Appendix – Key Players

Figure 58: MULO sales of feminine hygiene, by leading companies and brands, rolling 52 weeks 2014 and 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com