

## Feminine Hygiene and Sanitary Protection Products - US - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"The feminine care market is moving further towards a competitive imbalance, with P&G becoming more dominant and private label encroaching on the position of smaller players. A rapidly aging consumer base makes growth a challenge; but there are opportunities."  
**- Jamie Rosenberg, Research Analyst**

This report looks at the following areas:

- **The market needs to reinvent itself for an aging society**
- **Managing bladder leakage will become crucial for feminine care brands**
- **Private label is innovating and growing share**

Natural products, improving consumer brand involvement, and durable sanitary protection suggest new paths for innovation in a cost-constrained 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

### 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 - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

The market needs to reinvent itself for an aging society

Figure 1: Total US retail sales and forecast of feminine hygiene and sanitary protection products, by segment, at current prices, 2012-22

Managing bladder leakage will become crucial for feminine care brands

Figure 2: Menstruation status, December 2017

Private label is innovating and growing share

Figure 3: Multi-Outlet sales of private label brands, by segment, rolling 52 weeks 2016 and 2017

The opportunities

Increase emotional engagement with feminine care brands

Figure 4: Feminine care innovation, December 2017

Prepare for a new era of natural products

Feminine hygiene products can create solutions for older consumers

Figure 5: Feminine hygiene product use, by age, December 2017

What it means

### The Market – What You Need to Know

The feminine care category will remain sluggish

Menopause has a growing influence

Pregnant women are an under-tapped market opportunity

### Market Size and Forecast

The market will remain sluggish

Figure 6: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2012-22

Figure 7: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2012-22

### Market Breakdown

Tampon sales are declining

Figure 8: Total US retail sales and forecast of feminine hygiene and sanitary protection products, by segment, at current prices, 2012-22

### Market Perspective

Menopause has a growing influence

Figure 9: Menstruation status, December 2017

Birth control choice can reduce per capita category spend

Figure 10: Women's usage of birth control pills and IUD's, May 2017

### Market Factors

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Feminine Hygiene and Sanitary Protection Products - US - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Pregnant women are under-tapped market opportunity

Figure 11: Female population by age, 2013-23

White women will become less relevant for market growth

Figure 12: Women by race and Hispanic origin, 2013-23

## Key Players – What You Need to Know

P&G is the big gainer, while Prestige is poised for future growth

Leading brands dominate and drive innovation

Private label is innovating, and in some cases leading

Natural/organic sanitary protection products are growing

Tampon segment struggles to stay relevant

Midsized sanitary protection brands with traditional products are in a tough spot

Sales of douches are declining

Natural will mainstream and evolve

## Company and Brand Sales of Feminine Hygiene and Sanitary Protection Products

P&G is the big gainer, while Prestige is poised for future growth

Figure 13: Multi-Outlet sales of feminine hygiene and sanitary products, by leading companies, rolling 52 weeks 2016 and 2017

## What's Working?

Always brand dominates and continues to innovate

Figure 14: Multi-Outlet market share of sanitary napkins, by leading brands, rolling 52 weeks 2016 and 2017

Private label is innovating, and in some cases leading

Figure 15: Multi-Outlet sales of private label brands, by segment, rolling 52 weeks 2016 and 2017

Figure 16: US private label pads and liners making thinness claims, 2013 -17

Natural and organic protection products are growing

Figure 17: Purchase of feminine care products with natural/organic material/ingredients, December 2017

Figure 18: Multi-Outlet sales of select natural sanitary protection products, rolling 52 weeks 2016 and 2017

## What's Struggling?

Tampon segment struggles to stay relevant

Figure 19: Multi-Outlet sales of tampons and menstrual cups, by leading companies and brands, rolling 52 weeks 2016 and 2017

Midsized sanitary protection brands with traditional products are in a tough spot

Sales of douches are declining

Figure 20: Multi-Outlet sales of douches, rolling 52 weeks 2016 and 2017

## What's Next?

Natural will mainstream and evolve

Marketing is shifting from reducing stigma to instilling pride

Menstrual cups are finding a loyal audience.

Figure 21: Multi-Outlet sales of menstrual cups, by leading companies and brands, rolling 52 weeks 2016 and 2017

## The Consumer – What You Need to Know

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Feminine Hygiene and Sanitary Protection Products - US - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

- Menopause and menstrual suppression reduce usage
- Durable sanitary protection remains niche, but will grow
- Feminine hygiene products need to target older women
- Feminine hygiene products are becoming more controversial
- Natural materials will break the innovation slump
- There is a cultural fragrance divide
- Target new and expectant moms
- Odor control remains an unmet need

## Feminine Care Product Usage

- Menopause and menstrual suppression reduce usage  
Figure 22: Feminine care product use, December 2017
- Life stage dictates product usage  
Figure 23: Disposable sanitary protection product use, by age, December 2017
- Durable sanitary protection remains niche, but will grow  
Figure 24: Reusable sanitary protection product use, by age, December 2017
- An opportunity to increase older consumers' interest in feminine hygiene  
Figure 25: Feminine hygiene product use, by age, December 2017
- Feminine hygiene products are becoming more controversial  
Figure 26: Feminine hygiene product use, by race and Hispanic origin, December 2017

## Important Factors when Choosing Sanitary Protection Products

- Absorbency, price, and fit are top purchase drivers  
Figure 27: Important factors when choosing sanitary protection products, December 2017
- Natural materials will break the innovation slump  
Figure 28: Important factors when choosing sanitary protection products, by age, December 2017
- There is a cultural fragrance divide  
Figure 29: Select important factors when choosing sanitary protection products, by race and Hispanic origin, December 2017

## Shopping Behaviors

- Price and habit are top purchase drivers  
Figure 30: Shopping behaviors, by panty liners, menstrual pads, tampons and feminine hygiene products, December 2017
- Target new and expectant moms  
Figure 31: Online and in-store purchasing behaviors for any feminine care products, by age and parental status, December 2017
- Store brands are closing the gap  
Figure 32: Name brand and store purchasing behaviors for any feminine hygiene products, by race and Hispanic origin and household income, December 2017
- Innovate around the belief that natural means safe  
Figure 33: Purchasing any feminine hygiene products with natural/organic materials, by age, December 2017
- Low-income shoppers may not be finding discounts  
Figure 34: discount purchasing behaviors for any feminine hygiene products, by household income, December 2017

## Attitudes toward Feminine Care Products

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Feminine Hygiene and Sanitary Protection Products - US - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Consumers fear leaks, but brands can be clearer about leakage protection

Figure 35: attitudes toward feminine care products, December 2017

Younger consumers see social media as a vehicle for brand outreach

Figure 36: Feminine care brand outreach on social media, by Millennial generation, December 2017

Focus on safe feminine hygiene for Black consumers

Figure 37: Feminine hygiene products can be bad for body's natural balance, by Millennial generation and race and Hispanic origin, December 2017

## Feminine Care Innovation

Odor control remains an unmet need

There is interest in pain relief, but many hurdles for brands

Figure 38: Feminine care innovation, December 2017

Figure 39: Usage and interest in feminine care innovation, by age, December 2017

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

## Appendix – The Market

Figure 40: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at inflation-adjusted prices, 2012-22

Figure 41: Total US retail sales and forecast of feminine hygiene and sanitary protection products, by segment, at current prices, 2012-22

Figure 42: Total US retail sales of feminine hygiene and sanitary protection products, by segment, at current prices, 2015 and 2017

Figure 43: Total US retail sales and forecast of feminine hygiene products, at current prices, 2012-22

Figure 44: Total US retail sales and forecast of sanitary napkins and liners, at current prices, 2012-22

Figure 45: Total US retail sales and forecast of tampons/menstrual cups, at current prices, 2012-22

Figure 46: Total US retail sales of feminine hygiene and sanitary protection products, by channel, at current prices, 2012-2017

Figure 47: Total US retail sales of feminine hygiene and sanitary protection products, by channel, at current prices, 2015 and 2017

## Appendix – Key Players

Figure 48: Multi-outlet sales of feminine hygiene products, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 49: Multi-Outlet sales of sanitary napkins, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 50: Multi-Outlet sales of tampons and menstrual cups, by leading companies and brands, rolling 52 weeks 2016 and 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)