

Feminine Hygiene and Sanitary Protection Products - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The UK’s ageing population has helped to create a fast-growing incontinence products market. That rosy picture doesn’t extend to the sanitary protection and feminine hygiene categories, however. The former is contending with a long-term fall in sales, while the latter is struggling to really convince consumers as to what benefits they can offer.”

– **Hera Crossan, Research Analyst**

This report looks at the following areas:

- **Ageing consumers will power incontinence category for years to come**
- **Feminine hygiene brands could reinvigorate their approach to re-engage consumers**

Growth in the feminine hygiene, sanitary protection and incontinence products market has remained relatively slow, falling from 2.5% in 2017 to an estimated 1.3% in 2018, taking the overall market to £484 million. The incontinence products category remains the growth engine of the market, increasing by an estimated 9.6% in 2018 and offsetting another estimated 5.2% fall in the larger sanitary protection category.

The UK’s ageing population is projected to act as a major driver of growth in the incontinence products category in the long term, while the feminine hygiene category continues to face issues with fluctuating sales and disengaged consumers. The long-term decline in value sales of sanitary protection products shows little sign of abating, and the 5% price cuts implemented by supermarkets over the past year have exacerbated the fall.

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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
Products covered in this Report
Feminine hygiene products
Adult incontinence
Excluded

Executive Summary

The market
Incontinence category props up overall growth
Figure 1: Best- and worst-case forecast of UK value sales of feminine hygiene, sanitary protection and adult incontinence products, 2013-23
Companies and brands
Refresh for Femfresh pays dividends
Figure 2: Retail value sales of feminine hygiene products, by brand, year ending October 2018
Value sales fall across sanitary protection category
Figure 3: Retail value sales of sanitary protection products, by brand, year ending October 2018
Tena continues to dominate incontinence category
Figure 4: Retail value sales of adult incontinence products, by brand, year ending October 2018
The consumer
Percentage of women menstruating rises across most age groups
Figure 5: Menstruation status in the last 12 months, by age, 2017 and 2018
Popularity gap widens between pads and tampons
Figure 6: Sanitary protection product usage, 2017 and 2018
Young women buy branded, while mothers go for own-label
Figure 7: Types of sanitary protection products purchased, branded vs own-label, October 2018
Sanitary protection buyers keenly price-focused
Figure 8: Behaviours around buying sanitary protection products, October 2018
Feminine hygiene products still not seen as essential
Figure 9: Usage of feminine hygiene products in the last 12 months, 2017 and 2018
Younger consumers see greater use for feminine hygiene products
Figure 10: Correspondence analysis of perceptions of feminine hygiene products, October 2018
Incontinence affects all age groups
Figure 11: Frequency of experiencing incontinence, by age, October 2018
Women experience incontinence more than men
Men less likely to use incontinence products
Figure 12: Usage of incontinence products, by gender, October 2018
Panty liners used as all-purpose products
Stigma towards incontinence not yet removed

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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 13: Attitudes towards incontinence, October 2018

What we think

Issues and Insights

Ageing consumers will power incontinence category for years to come

The facts

The implications

Feminine hygiene brands could reinvigorate their approach to re-engage consumers

The facts

The implications

The Market – What You Need to Know

Incontinence category props up overall growth

Fall in sanitary protection sales weighs on market

Recovery for feminine hygiene category

Tampon Tax price cuts affect value sales growth in supermarkets

Ageing population pushes sanitary protection down, incontinence up

Period poverty issue makes its mark in sanitary protection

Brands need to be aware of risks of environmental taxes

Market Size and Forecast

Incontinence category props up overall growth

Figure 14: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, at current and constant prices, 2013-23

Market growth set to continue

Figure 15: Best- and worst-case forecast of UK value sales of feminine hygiene, sanitary protection and adult incontinence products, 2013-23

Forecast methodology

Market Segmentation

Incontinence product sales growing

Figure 16: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, 2016-18

Fall in sanitary protection sales weighs on market

Recovery for feminine hygiene category

Channels to Market

'Tampon Tax' price cuts affect value sales growth in supermarkets

Figure 17: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, by outlet type, 2016-18

Market Drivers

Ageing population pushes sanitary protection down, incontinence up

Figure 18: Trends in the age structure of the UK population, by gender, 2013-23

Declining birth rate could buoy sanitary protection...

...but detract from incontinence segment

Figure 19: Trends in number of live births (thousands) and mean age of mothers at the birth of their child, England and Wales, 2006-17

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Obesity rates could fall, impacting incontinence

Figure 20: Trends in BMI, England, 1995-2016

Usage of oral contraception falling

Figure 21: Contraceptive prescription items dispensed in the community (England), 2011-17

Brexit and QE unwinding are dark clouds gathering

Figure 22: Trends in current financial situation compared to a year ago, July 2011-October 2018

Period poverty issue makes its mark in sanitary protection

Figure 23: Tampon Taxi initiative by Project Period, November 2018

Brands need to be aware of risks of environmental taxes

Companies and Brands – What You Need to Know

Refresh for Femfresh pays dividends

Tena continues to dominate incontinence category

Incontinence NPD is a growing focus

Ethical challenger brands active in NPD

P&G's adspend cut weighs on category overall

TV now almost completely dominant

Femfresh highly recommended

Market Share

Refresh for Femfresh pays dividends

Figure 24: Retail value sales of feminine hygiene products, by brand, years ending October 2016-18

Value sales fall across sanitary protection category

Figure 25: Retail value sales of sanitary protection products, by brand, years ending October 2016-18

Tena continues to dominate incontinence category

Figure 26: Retail value sales of adult incontinence products, by brand, years ending October 2016-18

Launch Activity and Innovation

Incontinence NPD is a growing focus

Figure 27: New product development in the UK feminine hygiene, sanitary protection and adult incontinence market, by product segment, January 2015-October 2018

Male incontinence begins growing as NPD focus

Figure 28: Examples of men's product launches in the adult incontinence protection market, 2018

NPD increasingly targets ethical concerns

Figure 29: New product development in the UK feminine hygiene, sanitary protection and adult incontinence market, by launch type, 2017

Essity grows its incontinence lines

Figure 30: New product development in the UK feminine hygiene, sanitary protection and adult incontinence products market, by ultimate company, January 2017-October 2018

Feminine hygiene products

Femfresh extends, while Vagisan adspends

Figure 31: NPD in the feminine hygiene market, 2017-18

Own-label NPD fluctuates

Figure 32: New product development in the UK female hygiene market, branded versus own-label, January 2015-October 2018

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 33: Examples of own-label product launches in the feminine hygiene market, 2017-18

More odour-neutralising claims in feminine hygiene

Figure 34: Top five claims in the UK feminine hygiene market (based on 2017), 2016 vs 2017

Figure 35: Examples of products with skin and odour-neutralising claims in the feminine hygiene market, 2017-18

Figure 36: YES organic intimate product range, 2018

Sanitary protection products

Ethical challenger brands active in NPD

Figure 37: Examples of new packaging launches in the sanitary protection market, 2018

Brands use on-pack promotions

Figure 38: Examples of products with on-pack promotions in the sanitary protection market, 2017-18

Own-label NPD trends upwards

Figure 39: New product development in the UK sanitary protection market, branded versus own-label, January 2015-October 2018

Figure 40: Own-label panty liner NPD in the sanitary protection market, 2017-18

Environmental claims rise in importance

Figure 41: Top five claims in the UK sanitary protection market (based on 2017), 2016 vs 2017

Figure 42: Examples of ethically focused NPD in the sanitary protection market, 2018

Sanitary protection innovation picks up

Figure 43: Lily Cup by Intimina collapsible, 2018

Figure 44: D. by Dame starter pack, 2018

Figure 45: Flex disc by The Flex Company, 2018

Figure 46: Tampliner by Callaly, 2018

Adult incontinence products

NPD targets convenience

Figure 47: Examples of new product and new formulation launches in the adult incontinence product market, 2017-18

Own-label NPD stays active

Figure 48: New product development in the UK adult incontinence market, branded versus own-label, January 2015-October 2018

Figure 49: Examples of new product and new formulation own-label launches in the adult incontinence product market, 2017-18

Time/speed claims respond to needs of older consumers

Figure 50: Top five claims in the UK adult incontinence protection market (based on 2017), 2016-17

Figure 51: Examples of new product and new formulation launches with time/speed claim in the adult incontinence product market, 2017-18

Brands helping consumers to make lifestyle changes

Figure 52: Elvie Trainer, 2018

Figure 53: Light's by Tena's My Pelvic Floor Fitness app, January 2018

Advertising and Marketing Activity

Incontinence segment drives category adspend

Figure 54: Total above-the-line, online display and direct mail advertising expenditure on sanitary protection, feminine hygiene and adult incontinence products, by category, January 2015-October 2018

P&G adspend cut weighs on category overall

Figure 55: Recorded above-the-line, online display and direct mail total advertising expenditure on feminine hygiene, sanitary protection and incontinence products, by leading companies (based on 2018), January 2015-October 2018

TV now almost completely dominant

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 56: Recorded above-the-line, online display and direct mail total advertising expenditure on the feminine hygiene, sanitary protection and adult incontinence market, by media type, January 2015-October 2018

Tena targets newer demographics

Figure 57: Tena Lady Discreet advert, March 2018

Lights by Tena aims at active women

Figure 58: Lights by Tena trampoline class TV advert, July 2018

2018 saw more ethical campaigns

Figure 59: Always #EndPeriodPoverty participation campaign, November 2018

Femfresh joins the ethical advertising trend

Figure 60: Femfresh #SheTalks campaign, April 2018

Vagisan also talks openly

Figure 61: Jenny Eclair in Vagisan commercial, 2018

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 62: Attitudes towards and usage of selected brands, November 2018

Key brand metrics

Figure 63: Key metrics for selected brands, November 2018

Bodyform seen as offering good value

Figure 64: Attitudes, by brand, November 2018

Femfresh regarded as ethical

Figure 65: Brand personality – macro image, November 2018

Tena risks alienating younger crowd

Figure 66: Brand personality – micro image, November 2018

Brand analysis

Consumers proud to be associated with Always

Figure 67: User profile of Always, November 2018

Bodyform reaches younger and lower-income consumers

Figure 68: User profile of Bodyform, November 2018

Femfresh comes highly recommended

Figure 69: User profile of Femfresh, November 2018

Tena nears household name status

Figure 70: User profile of Tena, November 2018

Vagisil seen as caring about health and wellbeing

Figure 71: User profile of Vagisil, November 2018

Attends well positioned for growth

Figure 72: User profile of Attends, November 2018

The Consumer – What You Need to Know

Percentage of women menstruating rises across most age groups

Popularity gap widens between pads and tampons

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Young women buy branded, while mothers go for own-label
 Sanitary protection buyers keenly price-focused
 Feminine hygiene products still not an essential
 Younger consumers see greater use for feminine hygiene products
 Incontinence affects all age groups
 Women experience incontinence more than men
 Men less likely to use incontinence products
 Panty liners used as 'all-purpose' products
 Stigma towards incontinence not yet removed

Menstruation Status

Percentage of women menstruating rises across most age groups
 Figure 73: Menstruation status in the last 12 months, by age, 2017 and 2018

Usage of Sanitary Protection Products

Popularity gap widens between pads and tampons
 Figure 74: Usage of sanitary protection products, 2017 and 2018
 Reusables yet to dent lead of disposable products

Types of Sanitary Protection Products Purchased

Young women buy branded, while mothers go for own-label
 Figure 75: Types of sanitary protection products purchased, branded vs own-label, October 2018
 Figure 76: Types of sanitary protection products purchased, branded vs own-label, by age, October 2018

Behaviours around Buying Sanitary Protection Products

Sanitary protection buyers keenly price-focused
 Figure 77: Behaviours around buying sanitary protection products, October 2018
 Online sales have little penetration as yet
 Figure 78: Freda period care subscription, 2018

Usage of Feminine Hygiene Products

Feminine hygiene products still not an essential
 Figure 79: Usage of feminine hygiene products in the last 12 months, 2017 and 2018
 Brands must re-engage consumers in feminine hygiene
 Figure 80: Usage of feminine hygiene products in the last 12 months, by age, October 2018

Perception of Feminine Hygiene Products

A need to shake off the unnecessary tag
 Figure 81: Correspondence analysis of perceptions of feminine hygiene products, October 2018
 Intimate wipes viewed more positively among young people
 Figure 82: Perceptions associated with feminine hygiene products, October 2018
 Threats could come from outside the category
 Figure 83: Body Hero shower oil by Glossier, 2018

**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 - UK - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Adult Incontinence Status

Incontinence affects all age groups

Figure 84: Frequency of experiencing incontinence, by age, October 2018

Women experience incontinence more than men

Figure 85: Women's frequency of experiencing incontinence, by age, October 2018

Figure 86: Men's frequency of experiencing incontinence, by age, October 2018

Usage of Adult Incontinence Products

Men less likely to use incontinence products

Figure 87: Usage of incontinence products, by gender, October 2018

Panty liners used as all-purpose products

Figure 88: Age breakdown of incontinence sufferers who do not use incontinence products, October 2018

Attitudes towards Adult Incontinence

Stigma towards incontinence not yet removed

Figure 89: Attitudes towards adult incontinence, October 2018

Figure 90: Agreement that there is a stigma around discussing incontinence, by age, October 2018

Brands help consumers help themselves

Perceptions of incontinence change with experience

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

Correspondence analysis methodology

Appendix – The Market

Figure 91: Best- and worst-case forecast of UK value sales of feminine hygiene products, 2013-23

Figure 92: Best- and worst-case forecast of UK value sales of sanitary protection products, 2013-23

Figure 93: Best- and worst-case forecast of UK value sales of adult incontinence products, 2013-23

Appendix – Companies and Brands

Figure 94: New product development in the UK feminine hygiene market, by launch type, January 2015-October 2018

Figure 95: New product development in the UK sanitary protection market, by launch type, January 2015-October 2018

Figure 96: New product development in the UK adult incontinence market, by launch type, January 2015-October 2018

Figure 97: Recorded above-the-line, online display and direct mail total advertising expenditure on feminine hygiene market, by media type, January 2015-October 2018

Figure 98: Recorded above-the-line, online display and direct mail total advertising expenditure on sanitary protection market, by media type, January 2015-October 2018

Figure 99: Recorded above-the-line, online display and direct mail total advertising expenditure on adult incontinence market, by media type, January 2015-October 2018

**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