

Contraceptives - US - July 2013

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“Consumers rely on OTC contraceptive products for planned protection from pregnancy and diseases. However, this market has some significant challenges. Contraceptive usage is driven by relationship status, there is a stronger focus on pregnancy prevention over STD/STI prevention, and developing the market among older adults will require tailored messaging and products.”
 – Gabriela Elani, Home & Personal Care Analyst

In this report we answer the key questions:

- Contraceptive usage is strongly driven by relationship status
- Incidence of STDs/STIs growing but focus is still on pregnancy prevention
- Older adults need tailored messaging and products

The U.S. contraceptives market has grown modestly over the past few years. In 2013, total U.S. retail sales for contraceptive products are \$1.1 billion, an 11% increase from the \$1 billion observed in 2008. However, sales are slowly starting to decline. The market posted its first decline in several years during 2011-12. Mintel expects that the category will experience flat to declining sales into 2018 as several external factors have the potential to negatively impact sales. The market, which is predominantly made of OTC (over-the-counter) products like condoms, emergency contraception, and female condoms, faces strong competition from prescription birth control methods, which will become more accessible for adults in 2014 when the Affordable Care Act (ACA) goes into effect nationwide. This category is also largely driven by relationship status—adults who are in committed relationships stop using condom products as they no longer have to worry about disease prevention and can switch to competing methods of birth control to prevent pregnancy.

Despite the negative drivers in the coming years, there are some opportunities for market players to grow usage and reinvigorate sales in some product segments. Some condom brands have found success in offering value-added products, which have performed well in the marketplace. Continued product innovation and integration of benefits that enhance sexual experiences will continue to drive sales. In addition, the rate of divorce has increased among older adults and it's likely that many will be dating again for the first time in years. Creating both condom and lubricant products that are tailored to the needs and preferences of older adults could also be a strong opportunity. Finally, a greater focus on STD/STI prevention may be worth exploring. Studies show that though fertility and birth rates are down, the incidence of STIs/STDs is increasing, especially among those aged 15-24. Companies and brands may want to increase their consumer engagement and reward consumers for safe sex practices along with driving increased usage of branded products.

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DID YOU KNOW?

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

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