"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.
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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

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The market will remain sluggish
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Menopause has a growing influence
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Pregnant women are under-tapped market opportunity

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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

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Always brand dominates and continues to innovate

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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

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Tampon segment struggles to stay relevant

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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
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  
Life stage dictates product usage  
Durable sanitary protection remains niche, but will grow  
An opportunity to increase older consumers’ interest in feminine hygiene  
Feminine hygiene products are becoming more controversial

**Important Factors when Choosing Sanitary Protection Products**

Absorbency, price, and fit are top purchase drivers  
Natural materials will break the innovation slump  
There is a cultural fragrance divide

**Shopping Behaviors**

Price and habit are top purchase drivers  
Target new and expectant moms  
Store brands are closing the gap  
Innovate around the belief that natural means safe  
Low-income shoppers may not be finding discounts

**Attitudes toward Feminine Care Products**
Consumers fear leaks, but brands can be clearer about leakage protection

Younger consumers see social media as a vehicle for brand outreach

Focus on safe feminine hygiene for Black consumers

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- Sales data
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Abbreviations and terms

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