

Feminine Hygiene and Sanitary Protection Products: Incl Impact of COVID-19 - US - September 2020

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and feminine hygiene and sanitary protection products
- Impact of recessionary spending on mainstream feminine care brands
- Opportunity for brands to step in as experts in feminine health and hygiene
- How stacking purposeful benefits can drive the category forward

US retail sales of feminine hygiene and sanitary protection products are estimated to increase by 3.5% in 2020, outpacing year-over-year category growth since 2015. In the past several years, the feminine care industry has welcomed many up and coming brands that have shaken up quality standards and consumer expectations. Ingredient transparency, use of sustainable and natural/organic materials, concern about plastic consumption and purpose-driven brands are top-of-mind for category users. Being a category that caters to younger, female consumers, key players that have implemented fresh perspectives on period care are driving market growth.



“The feminine hygiene and sanitary protection category is in a moment of growth and evolution. Consumer expectations are extending beyond functional needs, challenging key players to offer eco-friendly packaging, natural/organic materials and ingredient transparency at affordable price points.”

– **Andrea Wroble, Senior Research Analyst, Health and Wellness**

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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
- Key issues covered in this Report
- Definition
- COVID-19: Market context
- Economic and other assumptions

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market Overview**
Figure 1: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2015–25
- **Impact of COVID-19 on feminine hygiene and sanitary protection products**
Figure 2: Short-, medium- and long-term impact of COVID-19 on feminine hygiene and sanitary protection products, September 2020
- **Opportunities and Challenges**
- **Budget-friendly brands offering consumer-centric benefits will win during COVID-19**
Figure 3: COVID-19 shopping behaviors, by financial status, June 2020
- **COVID-19's amplified income gap may increase consumer knowledge gap**
- **Consumers want natural ingredients they recognize and trust**
- **Feminine hygiene products have unique opportunity with young adults**
Figure 4: Unmet feminine care needs, by age, June 2020

THE MARKET – KEY TAKEAWAYS

- **Essential women's health needs are prioritized through pandemic**
- **Sanitary protection products maintain dominance; hygiene heats up**
- **Consumer identities must be considered by brands**
- **Purpose-driven benefits will drive category spending**
- **Feminine care doesn't stop at menopause**

MARKET SIZE AND FORECAST

- **Feminine hygiene and sanitary protection products are essential**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

Figure 5: Projected age groups of US female population, 2016-30
 Figure 6: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2015-25
 Figure 7: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at current prices, 2015-25

Impact of COVID-19 on feminine hygiene and sanitary protection products

Figure 8: Short-, medium- and long-term impact of COVID-19 on feminine hygiene and sanitary protection products, September 2020

- Lockdown
- Re-emergence
- Recovery
- COVID-19: US context
- Learnings from the last recession

SEGMENT PERFORMANCE

Sanitary protection products maintain dominance in category

Figure 9: Total US retail sales and forecast of feminine hygiene and sanitary protection products, by segment, at current prices, 2015-25

MARKET FACTORS

- Consumers will turn to higher quality, value tier products
 Figure 10: COVID-19 shopping behaviors, by financial status, June 2020
- Brands must consider the Identity of multiple consumer segments
- Category users demand product quality
- Transgender men are users of sanitary protection/hygiene products

Figure 11: Female category users vs transgender male category users, June 2020

- Brands can play a role in price equity awareness
- Stacking purpose-driven benefits wins with consumers

Figure 12: Product attributes of influence, June 2020
 Figure 13: L. products, August 2018

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

MARKET OPPORTUNITIES

- **Learning from the clean movement; focus on education and transparency**

Figure 14: Social media mentions of #cleanbeauty, #naturalbeauty, #greenbeauty and #organicbeauty, October 2016-19

- **Support the transition to menopause**

Figure 15: Feminine care knowledge of select health topics, by age, June 2020

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Brand extensions supported growth for P&G**
- **Private label competes with trend-driven, budget-friendly name brands**
- **Product trends moving into the mainstream**
- **Menstrual symptoms extend beyond monthly periods**

MARKET SHARE

- **P&G captures MULO sales thanks to new product lines**

Figure 16: US multi-outlet sales of feminine hygiene and sanitary products, by leading companies, rolling 52 weeks 2019 and 2020

- **Private label loses share against mainstream sanitary product brands**

Figure 17: US multi-outlet sales of sanitary napkins/liners, by leading companies and brands, rolling 52 weeks 2019 and 2020

- **Environmentally conscious tampon brands heat up**

Figure 18: US multi-outlet sales of tampons, by leading companies and brands, rolling 52 weeks 2019 and 2020

- **Niche brands outpace sales growth of category leaders**

- **Feminine hygiene players address lifestyle needs of category users**

Figure 19: US multi-outlet sales of select feminine hygiene brands, rolling 52 weeks 2019 and 2020

- **Menstrual cup brands focus on experience and comfort**

Figure 20: US multi-outlet sales of select menstrual cup brands, rolling 52 weeks 2019 and 2020

Figure 21: Sanitary protection products cause discomfort, by product usage in the past 12 months, June 2020

COMPETITIVE STRATEGIES

- **New approaches to the plastic problem**
- **Natural/organic, rooted in safety and efficacy**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

Figure 22: Product attributes of influence, June 2020

- **Natural trends are influencing product claims**

Figure 23: Claim categories influencing feminine hygiene and sanitary protection products, 2015-2020

Figure 24: Product attributes of influence, June 2020

- **Skin health presents area of opportunity**
- **Bundled products to support women’s health needs at all stages**

Figure 26: Attitudes toward menstruating, June 2020

THE CONSUMER – KEY TAKEAWAYS

- **Vaginal wellness increases usage of feminine hygiene products**
- **Consider marketing to lifestyle occasions**
- **Once nice-to-have benefits are now expected product attributes**
- **Menstrual health routines can help consumers gain control**
- **Consumers are not the experts in feminine care; opportunity for brands**
- **COVID-19 behaviors shifts are driven by financial circumstance**

PRODUCT USAGE

- **Market for vaginal wellness stimulates feminine hygiene usage**

Figure 27: Product usage, June 2020

- **Leakage concerns support need for sanitary protection products**

Figure 28: Female population, by age, 2013-23

Figure 29: Menstruation status, June 2020

- **Young women are most active in the category**

Figure 30: Product usage, by age, June 2020

Figure 31: Honey Pot mommy-to-be and post-partum product collection, October 2019

- **Feminine hygiene products provide value for Black consumers**

Figure 32: Product usage, by race and Hispanic origin, June 2020

Figure 33: Coddle perineal balm, July 2020

UNMET FEMININE CARE NEEDS

- **Myriad of unmet needs indicates opportunity for vaginal health routines**

Figure 34: Unmet feminine care needs, June 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

- Vaginal hygiene concerns support hygiene product market**
 Figure 35: Unmet feminine hygiene needs, by product usage, June 2020
- Lifestyles of young adults amplify certain feminine care needs**
 Figure 36: Unmet feminine care needs, by age, June 2020

PRODUCT ATTRIBUTES OF INFLUENCE

- Functional category stunts investment in trends**
 Figure 37: Product attributes of influence, June 2020
- Natural ingredients will gain most traction with a familiar approach**
 Figure 38: Product attributes of influence, June 2020
- The number of menopausal women who experience bladder leakage continues to grow**
 Figure 39: Willingness to pay for products designed for specialized needs, by age, June 2020

ATTITUDES TOWARD MENSTRUATING

- Establishing routines to gain control over menstruation**
 Figure 40: Difficulty controlling symptoms of menstruation, by feeling stressed around time of period, June 2020
- Acknowledging menstrual pain**
 Figure 41: Attitudes toward menstruating, June 2020
- Young women need support to manage menstrual symptoms**
 Figure 42: Attitudes toward menstruating, by age, June 2020
 Figure 43: Rael heating pad, May 2020

FEMININE CARE KNOWLEDGE

- Room to grow consumer confidence on products to support vaginal health**
 Figure 44: Feminine care knowledge, June 2020
- Discovery phase and menopausal phase lack feminine health knowledge**
 Figure 45: Feminine care knowledge of select health topics, by age, June 2020
 Figure 46: The Spot by Lola, September 2020
- Income differences reveals gap in feminine health education**
 Figure 47: Feminine care knowledge of select health topics, by household income, June 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

COVID-19 SHOPPING BEHAVIORS

- **Feminine care consumers have maintained their usual shopping habits**
Figure 48: COVID-19 shopping behaviors, June 2020
- **When money gets tight, consumers stock up on less expensive brands**
Figure 49: COVID-19 shopping behaviors, by financial status, June 2020
Figure 50: L. sanitary protection products, August 2020

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

APPENDIX – THE MARKET

Figure 51: Total US retail sales and forecast of feminine hygiene and sanitary protection products, at inflation-adjusted prices, 2015-25
 Figure 52: Total US retail sales of feminine hygiene and sanitary protection products, by segment, at current prices, 2018 and 2020
 Figure 53: Total US retail sales of feminine hygiene and sanitary protection products, by segment, at current prices, 2018 and 2020

APPENDIX – COMPANIES AND BRANDS

Figure 54: US multi-outlet sales of feminine hygiene products, by leading companies and brands, rolling 52 weeks 2019 and 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.