

# Taboo-Breaking Business

## Understanding the changing feminine care market



New brands are entering the feminine intimate care and sanitary protection market, empowered by fresh thinking and taboo-busting messaging. Women are seeking disruption in this space, but at what pace is real change happening? The revolution holds huge potential but remains in its infancy. Gen Z and Millennials are most interested in newness and disruption, so the adage adapt or die certainly applies to this market.

### HOW BIG IS THIS BUSINESS?

**\$3.2B**

The size of the U.S. sanitary protection market (tampons, pads) in 2018, reflecting 1% growth



Though much smaller than sanitary protection, **the feminine intimate care category is expected to grow 3.4% by 2025.**

**This market is largely being driven by interest from Gen Z and Millennials**

### WHAT'S WORKING AND WHAT'S NOT

The **tampon market is expected to decline** as women seek disruption, demographics change, and the use of hormonal contraceptives rises

10%: YoY growth this year for **adult incontinence**, the fastest growing category

5.7%: YoY growth this year for wipes, which are flourishing as awareness increases



### THE BEGINNING OF CHANGE

Subscription services and bundles are on the rise, offerings that often message overall wellness

**21%**

**of Millennials have purchased feminine care products online** (through a subscription service or not), the highest rate for any generation

*that said*

**67%**

**of all women surveyed purchased their products in-store**

### ORGANIC GOES DOWN THERE

Sales of natural and organic tampons are expected to **increase**, even though the category overall is anticipated to fall

26% felt that organic products are better for the environment



**23% of Millennials and 22% of Gen Zers reported that natural/organic materials were important** when choosing their disposable protection products

19% of all women surveyed believe that organic products are better for them

### SEEN WHILE SCROLLING

**43%** of Younger Millennials and **22% of Older Millennials** heard about their new feminine care products on social media

*Compare that with*

**11%** of Non-Millennials



### WHAT WOMEN WANT



**45%**

of women are interested in pads/liners that help with **skin comfort**

**45%**

are interested in **antibacterial** sanitary protection products

**43%**

are interested in products with **natural odor** control ingredients

**79%**

of women said they are **NOT** interested in reusable tampon applicators

### PLANTING DISRUPTION

Electrospun nanofibers based on **plant-based polymers** were recently developed and could be the future for disposable sanitary products

