

ABSORBENT AND INTIMATE HYGIENE – US – 2024

Consumers are engaging with the category in new ways, but need guidance from brands. Educate and empower to validate claims and meet evolving demands.



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Absorbent And Intimate Hygiene - US - 2024

This report looks at the following areas:

- Market size and forecast of the absorbent and intimate hygiene product market
- How companies/brands are performing and key strategies to remain competitive in the space
- Menstrual lifestage and experience
- Usage of absorbent and intimate hygiene products
- Approach to managing symptoms associated with menstruation and menopause
- Typical approach to shopping for absorbent and intimate hygiene products
- Current level of knowledge regarding vaginal health and related topics
- Attitudes and frustrations toward products and brands



Consumers are engaging with the category in new ways, but need guidance from brands. Educate and empower to validate claims and meet evolving demands.

Overview

A number of catalysts are providing an enjoyable growth spurt for the absorbent and intimate hygiene market. The total market is valued at \$4.7 billion in 2023, a 23% increase from 2018. This moment for intimate care will not be quick to pass, sustained and reinvented in the coming years as a natural extension of self-care, holistic health and body positivity, backed by women with increasing access to knowledge and tools to take control of their own vaginal health and wellness.

Despite the economic slowdown, the absorbent and intimate hygiene market has great potential and will only continue to expand, supported by further education, category normalization, and retail shelf expansion.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market size and forecast
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Menstrual lifestage and experience

- An aging population will shift the market focus
 - Graph 1: menstrual status, 2024
- Age drives menstruation
 - Graph 2: menstrual status, by age, 2024

Absorbent and intimate hygiene product usage

- Disposables dominate, but reusables can gain favor
 - Graph 3: absorbent hygiene product usage, by menstrual experience, 2024
- Reusables can leverage new data to address misconceptions
- Address the financial burden of periods
 - Graph 4: usage of select absorbent hygiene products, by age and income, 2024
- Reusables remain niche, but can grow with older audience
- Market for vaginal wellness stimulates intimate hygiene usage
 - Graph 5: intimate hygiene product usage, 2024
- Develop products for the lifestage continuum
 - Graph 6: repertoire of intimate hygiene products, by age, 2024

Management of symptoms

- A myriad of unmet needs supports a nuanced, holistic approach
 - Graph 7: management of symptoms, 2024
- Threats from adjacent category encroach on intimate hygiene territory
- Break the cycle: make sure consumers don't settle for products
 - Graph 8: management of leakage with product usage, by satisfaction with product experience, 2024
- Provide intuitive guides to help identify the right product

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- Graph 9: management of vaginal health symptoms – use product on the onset of symptom, by repertoire of intimate hygiene products, 2024
- Tailor products to address age-specific concerns
- Mass brands can help facilitate the move away from medical interventions

Absorbent and intimate hygiene shopping behaviors

- Habit and price influence shopping behaviors
 - Graph 10: absorbent and intimate hygiene shopping behaviors, 2024
- Overcome unease among younger shoppers
- Engage younger shoppers in the learning and research process
 - Graph 11: increase focus on claims/ingredients, by age, 2024

Vaginal health care knowledge

- The new era of vaginal care based in education
 - Graph 12: vaginal health care knowledge, 2024
- Address the knowledge gaps when it comes to flow
- Thirst for knowledge not only driven by the young
 - Graph 13: interest in learning about select intimate hygiene topics, by age, 2024

Attitudes and frustrations

- Brands can be clearer about performance features
 - Graph 14: attitudes and frustrations, 2024
- Transparency and education: be grounded in data to win over youths
 - Graph 15: select attitudes and frustrations, by age, 2024
- Help Gen X women break their silence

COMPETITIVE STRATEGIES

Launch activity and innovation

- A shake up for absorbent hygiene may be on the horizon
- New designs and materials can deliver on important performance attributes
- Access to at-home diagnostics will close the gap in access to care and autonomy
- Innovative solutions address gaps in gynecological health for key lifestages

Marketing and advertising

- Expand inclusivity to mirror evolving expectations
- A push to reframe menopause

Opportunities

- Healthy aging puts hormone harmony into focus

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- Pair absorbent and intimate hygiene with VMS and bodycare to streamline holistic inside-out regimens
- Expand care to accompanying symptoms
- Create affordable eco products
 - Graph 16: launch of private label absorbent hygiene products with ethical and environmental claims, 2020-24*

MARKET DYNAMICS

Market context

Market drivers

- Precocious puberty on the rise
- Population of menstruating women stagnates; aging population grows
 - Graph 17: female population by age, 2018-28
- The cost of having a period is on the rise
- Entrance of birth control to OTC market could shift engagement

Market size and forecast

- Growth will moderate as inflation weakens
- Retail sales and forecast of absorbent and intimate hygiene
- Annual household spending has grown by more than \$5 since 2018
 - Graph 18: average annual spending on absorbent and intimate hygiene, 2018-23

Market segmentation

- Retail sales of absorbent and intimate hygiene, by segment
 - Graph 19: total retail sales and forecast of absorbent and intimate hygiene, by segment, at current prices, 2018-28
- Retail sales of absorbent and intimate hygiene, by segment

Market share/brand share

- P&G represents more than half of value sales, but was outperformed by private label
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- Sales of intimate hygiene remain flat despite emerging vaginal health focus
- Sales of intimate hygiene products, by company
- Heavy hitters go natural and see some success
- Sales of sanitary napkins and liners, by company
- Sales of tampons, by company

APPENDIX

- Market definition
- Consumer research methodology

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- Abbreviations and terms
- Market size methodology
- Forecast
- Forecast fan chart
- Total retail sales and forecast of absorbent and intimate hygiene, at inflation-adjusted prices
- Average annual household spending on absorbent and intimate hygiene
- Total retail sales of absorbent and intimate hygiene, by segment
- Total retail sales and forecast of intimate hygiene products
- Total retail sales and forecast of intimate hygiene products, at inflation-adjusted prices
- Value, average price and volume of multi-outlet intimate hygiene products sales
- Total retail sales and forecast of sanitary napkins and liners
- Total retail sales and forecast of sanitary napkins and liners, at inflation-adjusted prices
- Value, average price and volume of multi-outlet sanitary napkins and liners sales
- Total retail sales and forecast of tampons
- Total retail sales and forecast of tampons, at inflation-adjusted prices
- Value, average price and volume of multi-outlet tampon sales
- Total retail sales of absorbent and intimate hygiene, by channel

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