

INTIMATE HYGIENE – GERMANY – 2023

The intimate hygiene category is ready for disruption. Brands should focus on breaking taboos, driving innovation and engaging non-users, especially men.



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Intimate Hygiene - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on the intimate hygiene category, including changing usage habits and buying intentions
- The usage of menstrual products, with disposable tampons without applicators being the most popular choice
- The usage of intimate hygiene products, with half of Germans not using any of them
- The usage of incontinence products, with disposable pads designed for bladder leakage being the top choice
- The interest in innovation from sanitary protection, intimate hygiene or incontinence brands, with strong focus on eco friendliness
- The savvy shopping behaviours for sanitary protection, intimate hygiene and incontinence products that display consumers' strong brand loyalty
- Launch activity and innovation showing a need for disruption in the market



The intimate hygiene category is ready for disruption. Brands should focus on breaking taboos, driving innovation and engaging non-users, especially men.

Overview

The intimate hygiene category has **seen growth** due to ongoing inflation and the conflict in Ukraine but is generally shrouded in **taboo and shame**. [Initial efforts to break the taboo around menstruation](#) have been **successful**. However, this is not yet the case for menopause and especially incontinence.

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The market is ripe for disruption in terms of modernising existing products and giving them a less-clinical feeling and expanding to **engage a significant amount of non-users**. **50% of consumers** do not use intimate hygiene products and **22% of consumers** who experience incontinence do not use any products. Consumers' worries about intimate hygiene products need to be dispelled and the inhibition threshold for buying incontinence products needs to be lowered by, for example, offering discreet delivery boxes (**22% of buyers of incontinence products** would be interested in this).

Men make up the majority of those non-users but **36% of men who have bought sanitary protection, intimate hygiene or incontinence products** are interested in products designed specifically for men. However, this is not yet reflected in launch activity, creating a significant opportunity for brands.

The popularity of disposables will continue but be counteracted by the rise of reusables and consumers' focus on eco friendliness.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for the intimate hygiene category

Market context

- Price hikes influence the category
- An ageing population and rising obesity rates will affect incontinence numbers

Mintel predicts

- Market size & forecast
- Mintel predicts steady growth until 2027
- Growth is predicted for the intimate hygiene category

Opportunities

- Continue to focus on eco-friendliness
- Encourage men to use intimate hygiene products
- Incontinence faces a significant amount of non-users
- Remove stigma around incontinence and bring a breath of fresh air to the category
- Dispel consumers' worries about intimate hygiene products
- Opportunities for intimate hygiene to move into the sexual health category

The competitive landscape

- Own label has a strong presence in the market
- The feminine hygiene category is dominated by few key players...
 - Graph 1: company shares of feminine hygiene products, 2022
- ...and so is the incontinence market
 - Graph 2: company shares of adult incontinence products, 2022
- Quick download resources

MARKET DRIVERS

- The cost of living crisis is holding back the post-COVID-19 recovery
 - Graph 3: key economic data, in real terms, 2019-24
- Inflation continues to be the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

- Price rises influence the category
- Cater to an ageing population
- Unlock the menopause market
- Obesity and its effect on incontinence
- Stigma around period is reducing, but there's a long way to go for incontinence
- Heightened interest in greener launches

WHAT CONSUMERS WANT AND WHY

Usage of menstrual products

- More than half of consumers use disposable tampons
 - Graph 4: types of menstrual product used, 2023
- Innovate in the tampon space
- Significant age difference in usage of reusable/disposable products
 - Graph 5: type of menstrual product used, by age group, 2023
- Market menstrual cups to older consumers who menstruate
- Financial situation affects usage of menstrual products
 - Graph 6: types of menstrual products used, by financial situation, 2023
- Emphasise cost-saving benefits of reusables
- Consumers use multiple products
- Non-usage is high

Usage of intimate hygiene products

- The usage of intimate hygiene products is low
 - Graph 7: types of intimate hygiene products used, 2023
- Focus on pH-friendliness to attract consumers
- Engage non-users to boost the category
- Significant usage differences between men and women in intimate hygiene
- Female-oriented products dominate the space
- Inspiration from European brands: soothing intimate hygiene products
- Focus on making incontinent consumers more comfortable
- Produce intimate hygiene that is good for the planet and body

Usage of incontinence products

- A third of Germans experience incontinence
- Usage of incontinence products is dominated by disposables
 - Graph 8: usage of incontinence products, 2023
- Reach incontinent non-users by alleviating their discomfort
- Break the taboo around incontinence through social media

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- UK brand Jude leads the way in a modern approach
- Encourage uptake of incontinence products among men
 - Graph 9: types of incontinence products used, by gender, 2023
- Consumers use a combination of products
- Address menstruation and incontinence needs in one product
- Gender-neutral packaging can be appealing
- Focus on reusable incontinence wear

Consumer interest in innovation from sanitary protection, intimate hygiene or incontinence brands

- The interest in eco friendliness is high
 - Graph 10: interest in innovation from sanitary protection, intimate hygiene or incontinence brands, 2023
- German consumers desire eco-friendliness
- Own-label brands could move into the eco-friendly space
- Use discreet delivery boxes for incontinence products
- Education and information about own health is appealing to consumers
- Encourage men to use intimate hygiene products

Savvy shopping behaviours

- Special offers are most popular with Germans
 - Graph 11: savvy shopping behaviours for sanitary protection, intimate hygiene and incontinence products, 2023
- Appeal to consumers through special offers
- Consumers are looking to save with lower-priced brands
- Make sustainability the core of your product
- Add value through subscription services
- Beware of consumers stopping usage
- Collaborate with businesses to offer free period products

LAUNCH ACTIVITY AND INNOVATION

- Skin health claims come to the fore
 - Graph 12: top 10 claims in intimate hygiene products, 2020-22
- Ethical and environmental claims are on the rise in intimate hygiene launches
 - Graph 13: intimate hygiene product launches with ethical and environmental claims, 2018-22
- Probiotics are becoming popular
- Consider infused tampons
- Reusable products are becoming more accessible
- The rise of reusables could pose a threat to disposables
- Use popularity of panty liners
- Einhorn: period products with a fun element

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- Collaborate with pop culture phenomena to educate
- Offer add-on or multiuse products to ease transition to reusable products
- Offer specialised detergent to help period underwear last longer
- Use indulgent textures in intimate hygiene products to excite consumers
- Opportunities for intimate hygiene brands to move into sexual health category
- Offer more products for men
- Groomed Rooster caters to men
- Tap into wellness trend for intimate hygiene

Advertising and marketing activity

- Podcasts shine light on taboo topics
- Be present on Instagram to further access to information
- Always Discreet addresses incontinence
- TENA opens up conversation around incontinence
- Increase representation of men in advertising
- TV ads emphasise the discretion of men's products

MARKET SHARE

- Market is dominated by key players
- Market share – feminine hygiene
- Market share – adult incontinence products

MARKET SIZE, SEGMENTATION AND FORECAST

- The market will grow in value but will also see more savvy shopping behaviour from consumers
- Mintel predicts steady growth

Market segmentation

- Strong growth in all segments
- 2022 was a year of growth in all segments

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value

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