

Report Price: £1995.00 | \$2693.85 | €2245.17

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



"There is a quiet revolution ongoing in the incontinence products segment. The stigma around incontinence appears to be fading, products are advertised on primetime TV, and brands are creating new designs that are more stylish and sophisticated. In feminine hygiene and sanitary protection, brands are becoming much bolder in their marketing approach."

- Hera Crossan, Research Analyst

# This report looks at the following areas:

- Always Discreet disrupts the incontinence segment
- . High brand loyalty for sanitary protection has potential to drive environmental change

Growth in the feminine hygiene, sanitary protection and incontinence products market has been relatively resilient. However, this has been driven by the increased value of the incontinence products segment, with the UK's ageing population and product development boosting penetration of dedicated products.

Sanitary protection remains the largest segment by value, although it subsequently frequently falls foul of competitive pricing strategies by retailers. Brand loyalty for sanitary protection is high, and leading brands could use this to their advantage in order to help drive more environmentally-friendly behaviours amongst women.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

+1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Products covered in this Report

Feminine hygiene products

Adult incontinence

Excluded

# **Executive Summary**

#### The market

#### Sector shows resilient growth

Figure 1: Best- and worst-case forecast of UK value sales of feminine hygiene, sanitary protection and adult incontinence products, 2012-22

#### Companies and brands

#### Vagisil and Canesbalance gain share of feminine hygiene market

Figure 2: Retail value sales of feminine hygiene products, by brand, year ending September 2017

#### Always loses market share for sanitary protection

Figure 3: Retail value sales of sanitary protection products, by brand, year ending September 2017

# Tena the market leader in incontinence products

Figure 4: Retail value sales of adult incontinence products, by brand, year ending September 2017

#### The consumer

# Sanitary pads lead in popularity

Figure 5: Sanitary protection product usage, October 2017

# Products for normal flow most popular

Figure 6: Sanitary protection usage for menstruation flow types, by age, October 2017

# Environmental concerns come to the fore

Figure 7: Behaviours around sanitary protection products, October 2017

# Sanitary protection enjoys high brand loyalty

# Feminine hygiene usage on the rise

Figure 8: Usage of feminine hygiene products in the last 12 months, October 2017

# A need to raise the profile of feminine hygiene

Figure 9: Attitudes towards feminine hygiene products, October 2017

# Incontinence experienced by 42%

Figure 10: Incontinence status by frequency, by age, October 2017

Figure 11: Incontinence status, by volume, by gender, October 2017

# Incontinence product sales rise but growth remains untapped

Figure 12: Usage of incontinence products, October 2017

# Discretion important for incontinence product buyers

Figure 13: Behaviours around incontinence products, October 2017

What we think



VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

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

#### **Issues and Insights**

Always Discreet disrupts the incontinence segment

The facts

The implications

High brand loyalty for sanitary protection has potential to drive environmental change

The facts

The implications

# The Market - What You Need to Know

Sector shows resilient growth

Incontinence products drive value growth

Supermarkets hold the key

'Tampon tax' affects prices

Birth rate drop has mixed results for future sales

# **Market Size and Forecast**

#### Sector shows resilient growth

Figure 14: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, at current and constant prices, 2012-22

# Growth set to continue

Figure 15: Best- and worst-case forecast of UK value sales of feminine hygiene, sanitary protection and adult incontinence products, 2012-22

Forecast methodology

#### **Market Segmentation**

#### Incontinence products drive growth

Figure 16: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, 2015-17

# Competitive pricing impacts sanitary protection

Feminine hygiene value sales slide

# **Channels to Market**

#### Supermarkets hold the key

Figure 17: UK retail value sales of feminine hygiene, sanitary protection and adult incontinence products, by outlet type, 2015-17

Figure 18: Tweet showing Tesco in-store signage highlighting coverage of tampon tax, September 2017

# **Market Drivers**

# Ageing population boosts incontinence market

Figure 19: Trends in the age structure of the UK population, by gender, 2012-22

# Birth rate drop has mixed results for future sales

Figure 20: Trends in number of live births (thousands), and mean age of mothers at the birth of their child, England and Wales, 2010-16

### Contraception usage may affect sector

Figure 21: Contraceptives prescription items dispensed in the community (England), 2010/11-2016/17

# Obesity growth to affect incontinence

Figure 22: Trends in obese body mass index (bmi), England, women only, 1996-2016

BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** 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

**EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

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

#### 'Tampon tax' affects prices

#### Financial confidence still lower than pre-referendum

Figure 23: Changes in household finances, January 2015-October 2017

#### **Companies and Brands - What You Need to Know**

Vagisil and Canesbalance gain share of feminine hygiene market

Always loses market share for sanitary protection...

...but Always Discreet gains in incontinence

Tena the market leader in incontinence products

New launches focus on discretion for incontinence

Feminine hygiene launch activity decreases

P&G leads the way in new launches

Always and Tampax dominate adspend

Empowering campaigns lead trends

Always Discreet benefits from sanitary protection association

Tampax considered effective and trusted

#### **Market Share**

#### Femfresh sales growth stalls in feminine hygiene segment

Figure 24: Retail value sales of feminine hygiene products, by brand, years ending September, 2015-17

# Bodyform sees sustained growth in sanitary protection

Figure 25: Retail value sales of sanitary protection products, by brand, years ending September, 2015-17

# Tena remains clear market leader for incontinence products

Figure 26: Retail value sales of adult incontinence products, by brand, years ending September, 2015-17

# **Launch Activity and Innovation**

# Incontinence products dominate NPD activity

Figure 27: New product development in the UK feminine hygiene, sanitary protection and adult incontinence market, by product segment, January 2014-November 2017

Figure 28: Examples of discreet and fitted product launches in the adult incontinence protection market, 2017

Figure 29: New product development in the UK feminine hygiene, sanitary protection and adult incontinence market, by launch type, 2016

# P&G leads in launch activity

Figure 30: New product development in the UK feminine hygiene, sanitary protection and adult incontinence products market, by ultimate company, January 2016-November 2017 Figure 31: New package designs of Tena Men ranges, December 2017

#### Adult incontinence products

# Own-label products follow discreet trend

Figure 32: New product development in the UK adult incontinence market, branded versus own-label, January 2014-November 2016

Figure 33: Examples of own-label product launches in the adult incontinence protection market, 2016-17

#### Odour neutralising claims key

Figure 34: Top five claims in the UK adult incontinence protection market, 2016

# Feminine hygiene

Launch activity slows



VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 35: Examples of new product launches in the feminine hygiene market, 2016-17

#### Wilko moves into intimate deodorants

Figure 36: New product development in the UK female hygiene market, branded versus own-label, January 2014-November 2017

Figure 37: Examples of own-label product launches in the feminine hygiene market, 2016-17

### New varieties gain momentum

Figure 38: Examples of new varieties/range extensions in the feminine hygiene market, 2016

#### Brands emphasise being gentle on skin

Figure 39: Top five claims in the UK feminine hygiene market, 2016

#### Sanitary protection products

# NPD in sanitary protection focuses on packaging design

Figure 40: Examples of new product launches in the sanitary protection market, 2016-17

#### Own-label packaging catches up with market leaders

Figure 41: New product development in the UK sanitary protection market, branded versus own-label, January 2014-November 2017

Figure 42: Examples of own-label product launches in the female sanitary protection market, 2016-17

#### Always and Kotex try new approaches

Figure 43: Examples of new packaging launches in the sanitary protection market, 2016-17

#### Environmental claims key

Figure 44: Top five claims in the UK sanitary protection market, 2016

Figure 45: Examples of 'natural' product launches in the sanitary protection market, 2017

# **Advertising and Marketing Activity**

#### Advertising spend sees a rise

Figure 46: Total above-the line, online display and direct mail advertising expenditure on sanitary protection, feminine hygiene and adult incontinence products, by category, January 2014-November 2017

#### P&G dominates adspend

Figure 47: Recorded above-the-line, online display and direct mail total advertising expenditure on feminine hygiene, sanitary protection and incontinence products, by leading companies (based on 2017), January 2014-November 2017

#### TV still the focus

Figure 48: Recorded above-the-line, online display and direct mail total advertising expenditure on the feminine hygiene, sanitary protection and adult incontinence market, by media type, January 2014-November 2017 Figure 49: Always Discreet TV commercial, December 2017

# Empowering campaigns around menstruation grow

Figure 50: Always: #LikeAGirl - Keep Going campaign, August 2017

Figure 51: Bodyform #BloodNormal campaign, October 2017

Figure 52: U by Kotex FITNESS tampon campaign, October 2017

# Nielsen Ad Intel coverage

# **Brand Research**

# Brand map

Figure 53: Attitudes towards and usage of selected brands, November 2017

#### Key brand metrics

Figure 54: Key metrics for selected brands, November 2017

# Brand attitudes: Tampax leads the way

Figure 55: Attitudes, by brand, November 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

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

#### Brand personality: Depend suffers image problem

Figure 56: Brand personality - Macro image, November 2017

#### Canesfresh seen as expert

Figure 57: Brand personality - Micro image, November 2017

#### Brand analysis

#### Canesfresh a recommended expert

Figure 58: User profile of Canesfresh, November 2017

# Always Discreet benefits from sanitary protection association

Figure 59: User profile of Always Discreet, November 2017

#### Tampax considered effective and trusted

Figure 60: User profile of Tampax, November 2017

#### Carefree struggles to gain users

Figure 61: User profile of Carefree, November 2017

#### Depend in need of image refresh

Figure 62: User profile of Depend, November 2017

#### The Consumer - What You Need to Know

Sanitary pads lead in popularity

Disposable sanitary protection most sought

Environmental concerns come to the fore

Sanitary protection enjoys high brand loyalty

Feminine hygiene usage on the rise

A need to raise the profile of feminine hygiene

Incontinence experienced by 42%

Discretion important for incontinence product buyers

#### **Menstruation Status**

#### 83% of women of menstruating age had periods in last year

Figure 63: Menstruation status in the last 12 months, by age, October 2017

# **Usage of Sanitary Protection Products**

#### Sanitary pads more popular than tampons

Figure 64: Sanitary protection product usage, October 2017

# Disposable products dominate

# Normal flow products most popular

Figure 65: Sanitary protection usage for menstruation flow types, by age, October 2017

# **Behaviours around Sanitary Protection Products**

# Individually wrapped products may raise environmental concerns

Figure 66: Behaviours around sanitary protection products, October 2017

The potential of reusable protection

67% stick to the same brand

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

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

# **Usage of Feminine Hygiene Products**

#### Panty liners an all rounder

Figure 67: Usage of feminine hygiene products in the last 12 months, October 2017

#### Feminine hygiene usage increases

Figure 68: Usage of feminine hygiene products in the last 12 months, October 2015 and October 2017

#### **Attitudes towards Feminine Hygiene Products**

#### Discretion still the key

Figure 69: Attitudes towards feminine hygiene products, October 2017

Raising the profile of feminine hygiene amongst younger women

#### **Incontinence Status by Frequency and Volume**

#### Incontinence becoming an everyday issue

Figure 70: Incontinence status by frequency, by age, October 2017

#### Dedicated products losing out to panty liners

Figure 71: Incontinence status, by volume, by gender, October 2017

#### Incontinence drives stress

Figure 72: Stress levels caused by incontinence, October 2017

#### **Incontinence Product Usage**

# Sales rise but growth remains untapped

Figure 73: Usage of incontinence products, October 2017

Sanitary protection dampens potential for incontinence products

# **Behaviours around Incontinence Products**

#### Women prefer discreet products

Figure 74: Behaviours around incontinence products, October 2017

More innovation for men needed

# Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

# **Appendix - Companies and Brands**

Figure 75: New product development in the UK feminine hygiene market, by launch type, January 2014-November 2017

Figure 76: New product development in the UK sanitary protection market, by launch type, January 2014-November 2017

Figure 77: New product development in the UK adult incontinence market, by launch type, January 2014-November 2017

Figure 78: Recorded above-the-line, online display and direct mail total advertising expenditure on feminine hygiene market, by media type, January 2014-November 2017

Figure 79: Recorded above-the-line, online display and direct mail total advertising expenditure on sanitary protection market, by media type, January 2014-November 2017
Figure 80: Recorded above-the-line, online display and direct mail total advertising expenditure on adult incontinence market, by

media type, January 2014-November 2017

**BUY THIS** REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300