



# Global Feminine Care: Update on Growth, Disruptors and Innovators

August 2020

Table of Contents

## GLOBAL FEMININE CARE: UPDATE ON GROWTH, DISRUPTORS, INNOVATORS

### Scope

#### Key findings

Towel format continues to dominate and sees positive growth globally

Supporting sanitary protection through innovative formats

Long-term potential in developing regions

Socioeconomic shifts and family planning as factors in reported periods

More cautious spending and priority for savings are expected

Common characteristics of premium brands

Premium feminine care: innovation, disruption and crossing life stages

Catering to Millennial and Gen Z mindsets

Insurgent brands witness high growth and customer base expansion

Product development inspired by comprehensive care in women's health

Rael: providing natural solutions throughout Millennials' hormonal cycle

Blume: becoming the to-go brand for Gen Z

Awareness of mental health connects self-care and menstruation

Natural continues to evolve

High demand for premium features with a natural twist in China

Engaging beyond product conversations and fitting into natural narrative

E-commerce grows but shoppers still move between channels

Challenges in delivery services...

...while store-based shopping is still very relevant

From DTC only to omnichannel: expansion continues

Digitalisation opens up creative, engaging ways to shop

Facebook stands out in purchase-related activities

Remembering that digitalisation ties closely with personal experience

Reusable disruption in feminine care: growing global presence

Snuggs: reusable menstrual underwear made of nanofibres

Pantys and Johnson & Johnson: partnering to build value segment

Growth ahead: 2020 impact of COVID 19 and beyond

Key takeaways 1: navigating through the COVID-19 era

Key takeaways 2: navigating beyond the COVID-19 era

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