

Evolution of Incontinence Management amid Lifestyle Shifts

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Scope

Key findings

Retail leads volume growth in global adult incontinence

Developing world offers significant potential for growth in per capita consumption

Supply-demand tailwinds uphold the US's and China's volume potential

Moderate/heavy format remains more prevalent in most regions

Light format has room for share gains as awareness arises among younger audience

Demand for efficacy and mobility drives prevalence of pull-on format

Health claims gain top retail exposure, with regional characteristics

Awareness gain-led demand increase calls for wider assortment

Multitasker targets a less-is-more approach to below-the-waist hygiene

Company-led education demystifies the unspeakable

Dignity-affirming marketing aims to debunk stereotypes and change perceptions

AFH incontinence growth relies on funding and infrastructure readiness

Health and social services industry landscape informs AFH incontinence outlook

Institutional care's financial woes may deepen AFH challenges

Rx incontinence remains a marginal segment, with uneven global prospects

Speed of economic recovery will shape category performance

Recovery is slowing, with COVID-19 variants posing further risks

Supply chain issue-induced inflation drives up prices and underscores value communications

Recessionary mindset beefs up cautious spending

Desire for value strengthens private label's appeal

The elderly remain a key driving force

Incontinence remains a far-reaching issue across demographics

The 15-29 cohort forms an upcoming wave of incontinence product purchasers

Lower income shoppers also add to the new consumer pool

"The older, the wealthier" reality does not hold everywhere

The young face widened income divergence and inequality

Women's income lag limits purchasing power

Male silence calls for deliberate outreach, marketing and product tailoring

Rise of health awareness and digital aids provide new lenses to incontinence care

Diagnostic and medical barriers drive a holistic approach to incontinence management

Adjacent health concerns inform wellness-charged horizontal diversification

Case study: Because offers a one-stop shop for multiple adult care needs

Consumers remain drawn to products tailored for their needs

Increased usage of online resources and e-commerce features further aid personalisation

Case study: Ontex reduces incontinence stigma and selection fatigue with A Lovely Day

Identifying unpenetrated markets for e-commerce-driven personalisation

Improved device access promotes smart tech adoption

Case study: Smart sensors guide incontinence care based on individuals' needs

Data privacy concerns can hinder e-commerce and smart tech prevalence

Access to technology could see health disparities among the less connected

Disruptors: Reusables combine cost-effectiveness, functionality and sustainability

Disruptors: Pelvis floor strengtheners and urinary leakage stoppers offer alternatives

Sustainability awareness increases after COVID-19

Quest for sustainable innovations is set to accelerate post-crisis

Asia Pacific leads sustainable claim-making, with "organic" resonating widely

Case study: Drylock debuts first US-made plant-based incontinence underwear

Case study: Re/upcycling goals shape industry agenda-setting and collaborations

Developing Asia Pacific markets offer opportunities in sustainability

Cost remains the main barrier to sustainability despite higher awareness

SWOT analysis of next phase of adult incontinence

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