

Exploring Paths to Growth in Menstrual Care Amid Value Reckoning

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INTRODUCTION

Scope

Key findings

STATE OF PLAY

Menstrual care remains a resilient category, with the slim towel a key growth driver

Growing underwear-style format further charges towels' growth momentum

Per capita potential underpins growth potential in developing Asia Pacific and Middle East and Africa

Improved awareness of menstrual condition and impact unveils growth opportunities

China remains the category lead, while India is on track to climb the leader board

However, potential causes of missed period may obviate menstrual care product demand

Reusable adoption is a two-edged sword that can hinder disposables' growth...

...but can also open new growth avenues

E-commerce takes a more active role in the menstrual care segment's expansion

Shift to predictive digital strategies helps businesses strengthen customer loyalty

Solution-driven personalisation lifts prospects for menstrual care's online path to purchase

Identifying unpenetrated markets for personalisation-driven market penetration

Period destigmatisation and education help brands dial deeper into shoppers' psyche

Phygital reality to influence menstrual care consumers' future shopping journey

Global stagflation's downward pressure can dampen category prospects

COMPETITIVE LANDSCAPE

Multinationals continue to lead the pack

Towels is a defining segment for leading players' competitive strength

Substantial inflation pressure sheds new light on competitive strategy

Procter & Gamble: Sharpen message to further communicate tangible value-added features

Unicharm: Diversify and tailor product mix to local preferences

Kimberly-Clark: Elevate manufacturing proximity to drive a business's local agility

Confrontation of period poverty constitutes another key pillar of corporate competency

KEY PILLARS FOR VALUE CREATION

Focus on quality, simplicity and wellness underpins multifaceted value perception

Key pillars to value creation in menstrual care

Clean claims in menstrual care maintain growth momentum in post-pandemic era

Clean claims remain top of leading players' product positioning

Clean claims tend to garner higher price points as consumers perceive added value

US in focus: "Natural" and "Organic" are associated with higher customer appreciation

Clean claim penetration continues to be led by smaller brands

Clean claims' uneven regional penetration unveils potential white space for growth

US leads clean menstrual trend while China tracks fastest penetration increase

US leads clean menstrual trend while China tracks fastest penetration increase

Sequel: Spiral grooves strengthen leak prevention during active hours

MOONS duets: Tampon-liner co-pack gathers a frequent leak-proof period duet in one place

PECTIV and yoona: Built-in anion layer protects against bacteria and abnormal odour

Kotex: PH indicator provides early signs of intimate health and changing needs

Comfort-forward communications forge an emotional bond with menstruators

Daye: No-sleeve design, bamboo core and bio-based packaging constitute stronger circularity

Vyld and Rif care: Algae and hemp among the latest emerging green alternative fibres

Post-life circularity remains a key investment frontier calling for interdisciplinary strategies

Rethinking menstrual care amid the holistic wellness movement

Synk Organic: Vulva skin care as a safe, logical entry to holistic menstrual care positioning

Rael: Facial skin care makes another attractive yet underserved adjacency

LOLA: Sexual wellness forms another linchpin to women's unmet lifecycle need states

Incontinence care forms a natural part of menstrual care brands' taboo-shedding endeavours

Essity: Combining holistic care and targeted curation leads to better life-stage care

Reimagine menstrual care products to democratise women's health access

What next in holistic menstrual care?

KEY TAKEAWAYS

Key takeaways

Learn more about how Via can unlock key strategic and tactical insights

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