



GLOBAL FEMININE HYGIENE MARKET & MILLENNIALS



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MARKETING INSIGHTS | EFFECTIVE TOOLS FOR SUCCESS**



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GLOBAL FEMININE HYGIENE MARKET & MILLENNIALS

GLOBAL FEMININE HYGIENE MARKETS



DYNAMICS

ECONOMIC,
DEMOGRAPHIC, &
MARKET SHIFTS



HABITS

USAGE &
SHOPPING
HABITS



COTTON

OPPORTUNITIES TO
MEET CUSTOMER
DEMAND

RESEARCH METHODOLOGY

- **CHINA** - QUANTITATIVE STUDY OF 500 FEMININE HYGIENE USERS & FOCUS GROUPS WITH 24 USERS
- **U.S.** - QUANTITATIVE STUDY OF 1,000 FEMININE HYGIENE USERS & TELEGROUPS WITH 26 USERS
- **EUROPE & MEXICO** – QUANTITATIVE STUDY OF 550 FEMININE HYGIENE USERS IN UK, ITALY, GERMANY, FRANCE, & MEXICO

MARKET DYNAMICS



ECONOMIC GROWTH TO 2030

U.S.

\$24.6T

+37%

MEX.

\$1.8T

+56%

REAL GDP IN 2030

+*GROWTH FROM 2015-30*

EU

\$20.8T

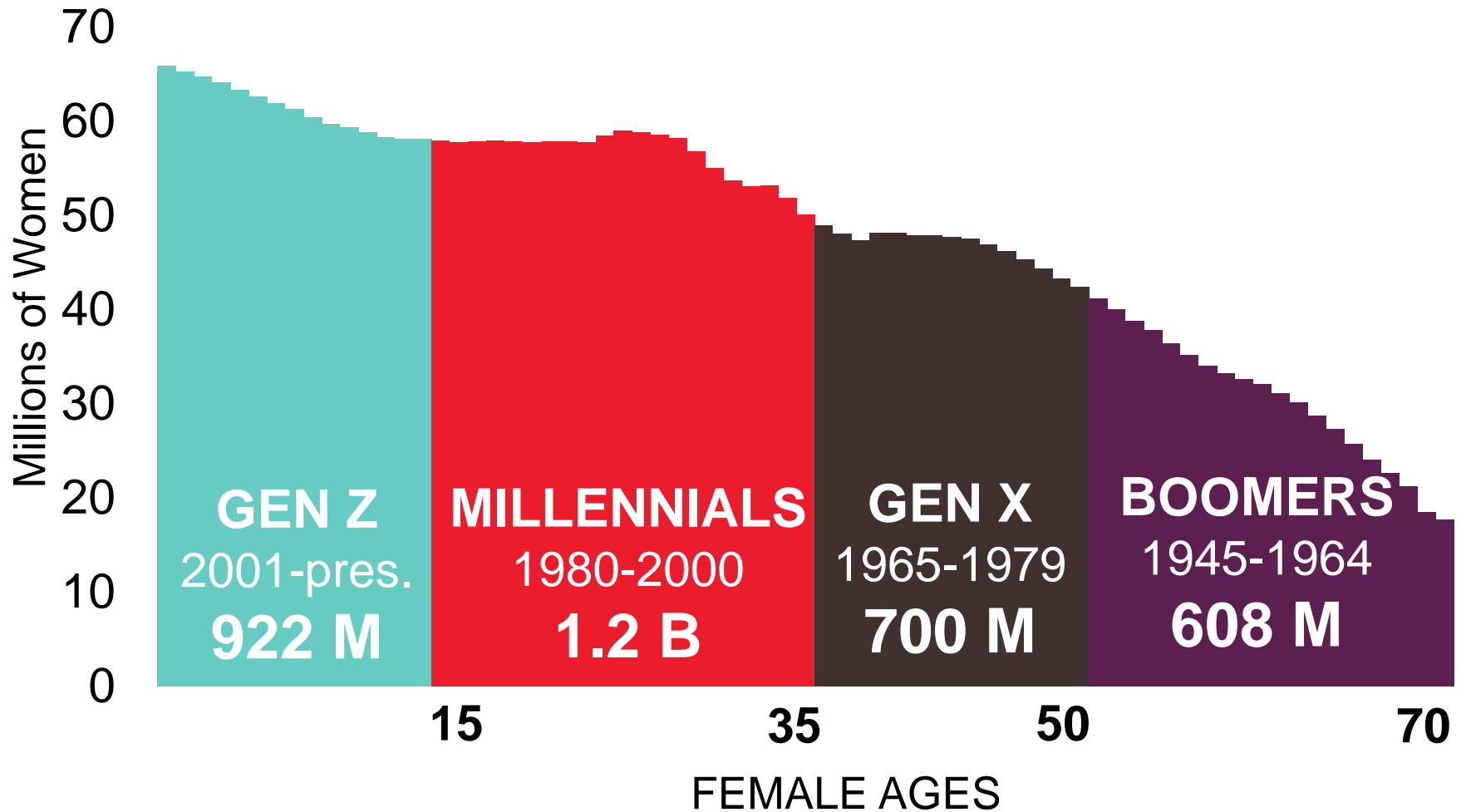
+28%

CHINA

\$23.7T

+110%

GLOBAL POPULATION BY GENERATIONS



FEMININE HYGIENE POPULATIONS

	POPULATION IN 2015	SHARE OF WORLD	CHANGE 2015-30
CHINA	388,623,200	19%	-15%
EU	124,810,700	6%	-9%
U.S.	82,272,700	4%	+7%
MEXICO	38,701,900	2%	+9%

FEMININE HYGIENE SALES

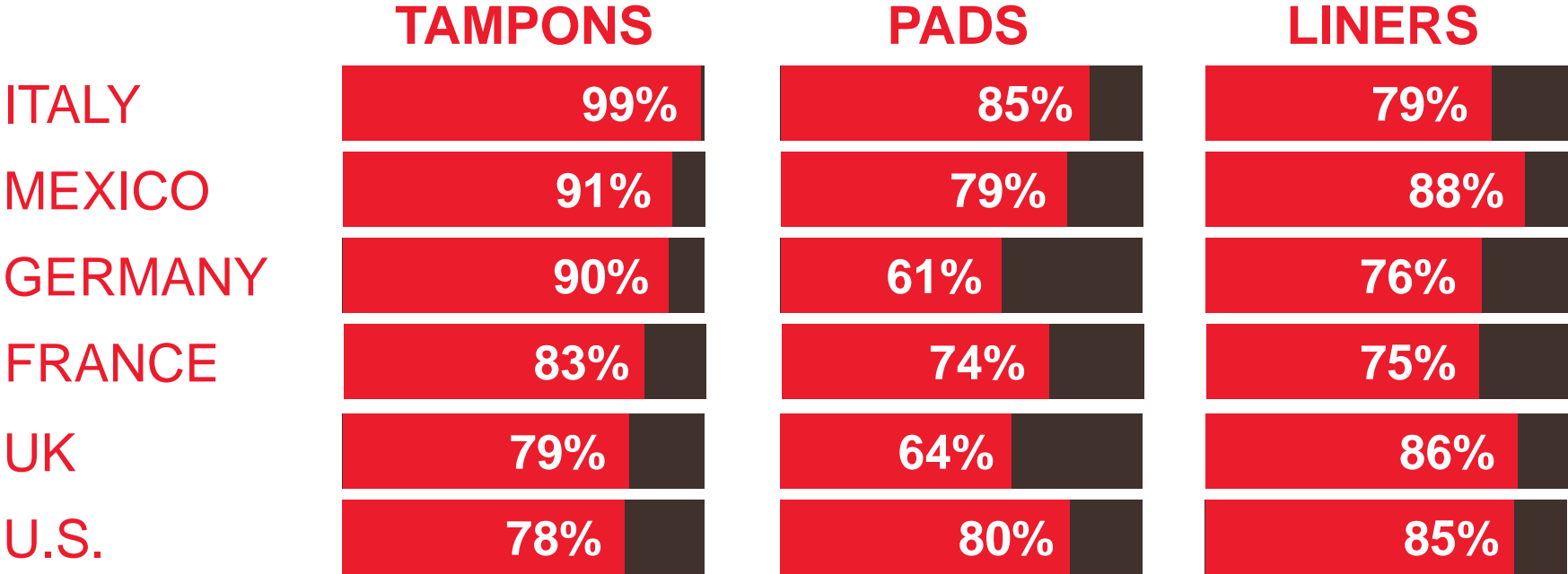
PERCENT CHANGE IN FEMININE HYGIENE SALES FROM 2015-2019 (USD BASIS)

	TAMPONS	PADS	LINERS
U.S.	+3.5%	+5.6%	-1.3%
Germany	-7.9%	-4.2%	-2.1%
UK	+2.8%	+1.6%	-8.2%
France	-8.6%	-0.3%	+1.1%
Italy	+1.5%	+0.8%	0.0%
Mexico	+19.4%	+14.2%	+16.8%



FEMININE HYGIENE BRANDS

TOP 3 BRANDS' ALLOCATION OF SALES IN 2014



MARKET DYNAMICS



OUTLOOK

ECONOMIC &
DEMOGRAPHIC
INDICATORS ARE
BRIGHT



GROWTH

MODERATE GROWTH
IN U.S. & EUROPE,
STRONGER GROWTH
IN MEXICO



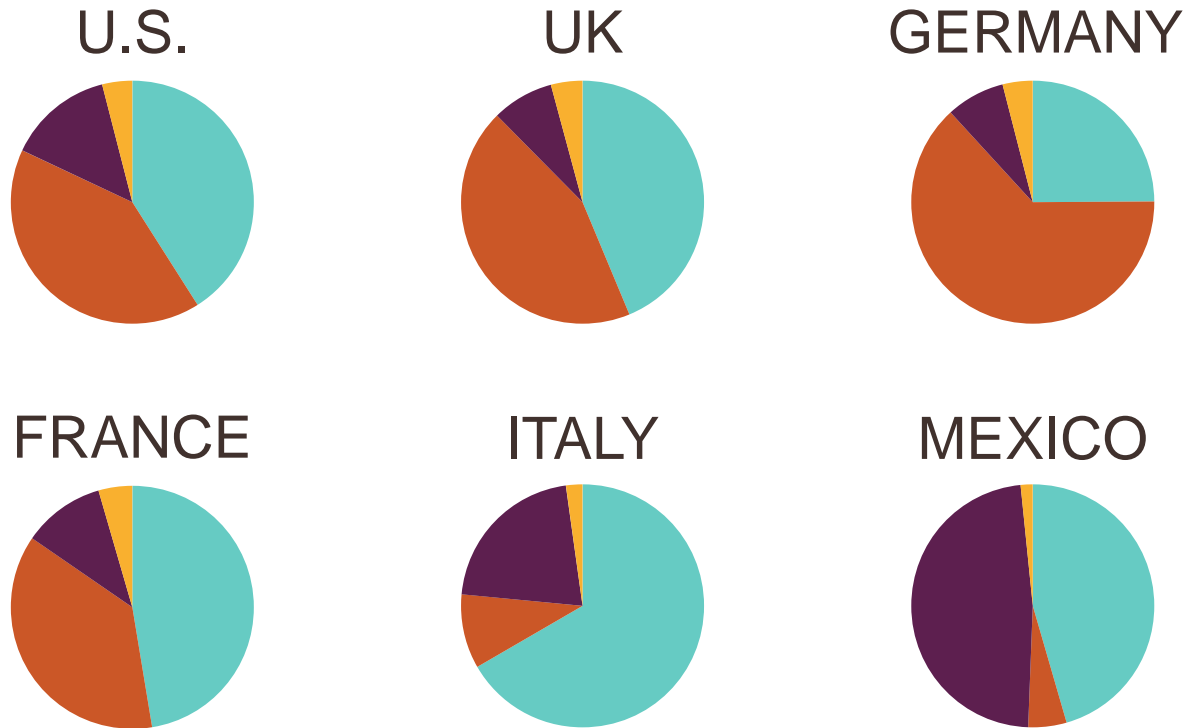
LOYALTY

FEW BRANDS
DOMINATE THE
MARKET

USAGE & SHOPPING HABITS



FEMININE HYGIENE PRODUCT USAGE



REGULAR PADS TAMPONS NIGHT PADS LINERS



FEMININE HYGIENE

TAMPON COMBO PRODUCT USAGE

PERCENT OF TAMPON USERS WHO ALWAYS OR USUALLY USE THE FOLLOWING WHEN USING A TAMPON



BARRIERS PREVENTING TAMPON USAGE

CHINA

MEXICO

ITALY

1

don't know how
to use **38%**

uncomfortable
39%

never tried them
18%

2

never heard of
them **31%**

never tried them
18%

uncomfortable
17%

3

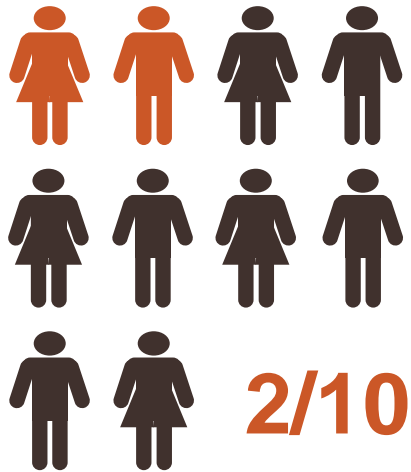
bad for health
23%

don't like them
15%

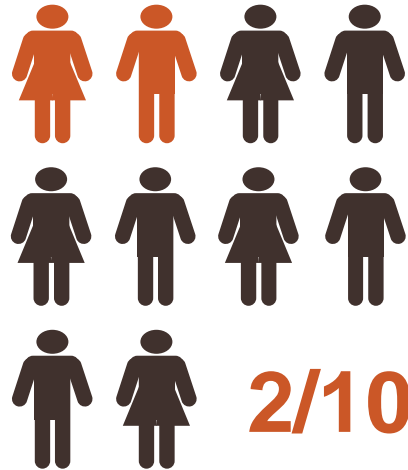
don't like them
17%



DIGITAL OUTREACH



Follow feminine hygiene brands on social media



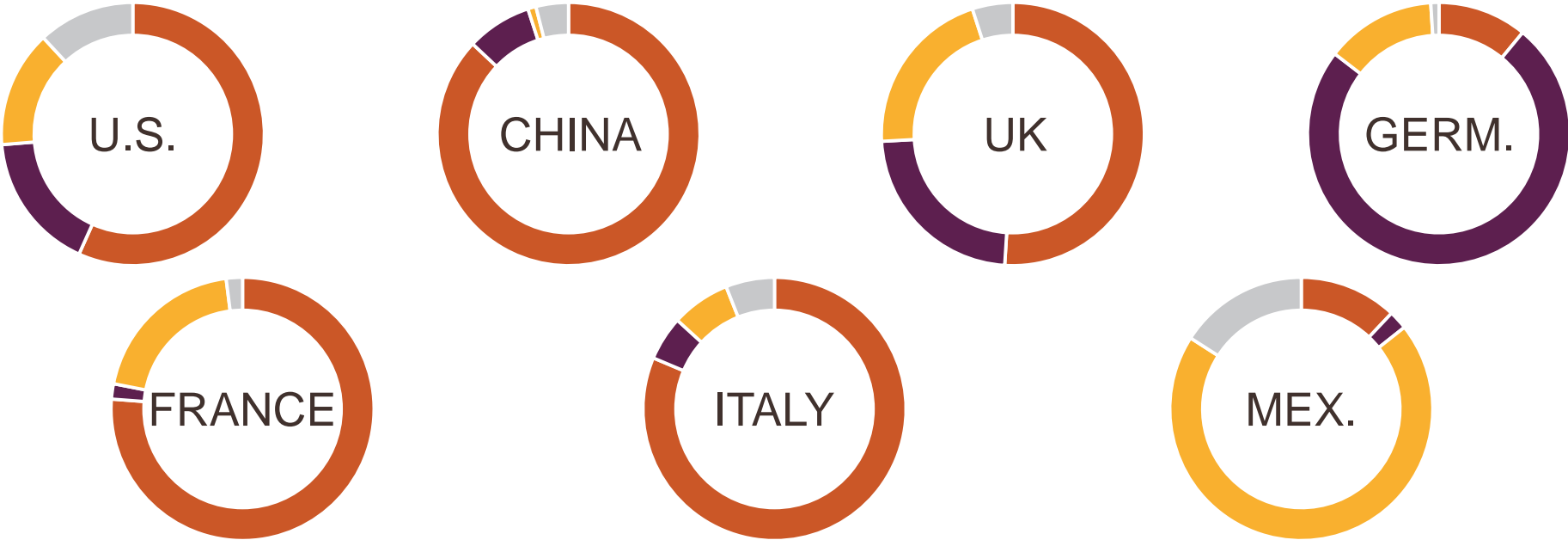
Get information* through feminine hygiene brand sites



Get information* through social media sites

RETAIL CHANNELS SHOPPED

CHANNELS SHOPPED FOR MOST FEMININE HYGIENE PRODUCTS

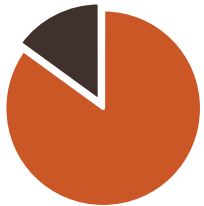


■ Mass Merchants ■ Drug Stores ■ Grocery Stores ■ Other

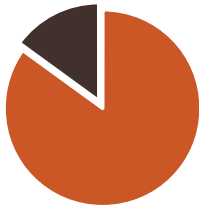


BRAND LOYALTY

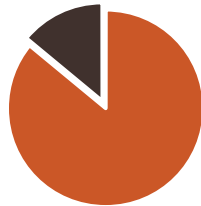
PERCENT WHO GENERALLY STICK WITH THE SAME BRAND OF FEMININE HYGIENE PRODUCTS



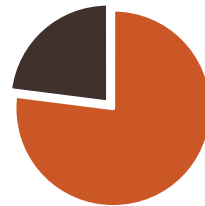
U.S.



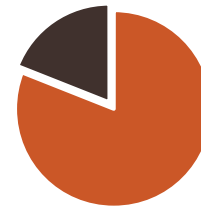
UK



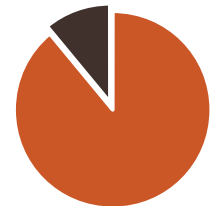
GERMANY



FRANCE



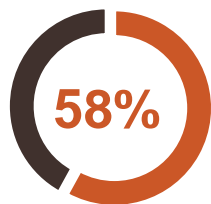
ITALY



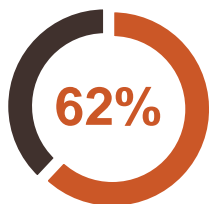
MEXICO

BREAKING BRAND

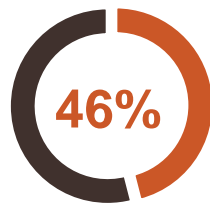
PERCENT WILLING TO SWITCH BRANDS FOR A BETTER PRICE



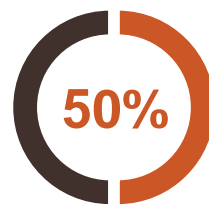
U.S.



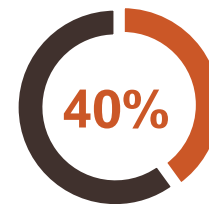
UK



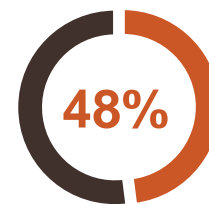
GERMANY



FRANCE



ITALY



MEXICO



PRIMARY FEMININE HYGIENE PURCHASE DRIVERS



PERFORM

PREVENT LEAKS
ABSORBENT
KEEP SKIN DRY
FUNCTIONAL



COMFORTABLE

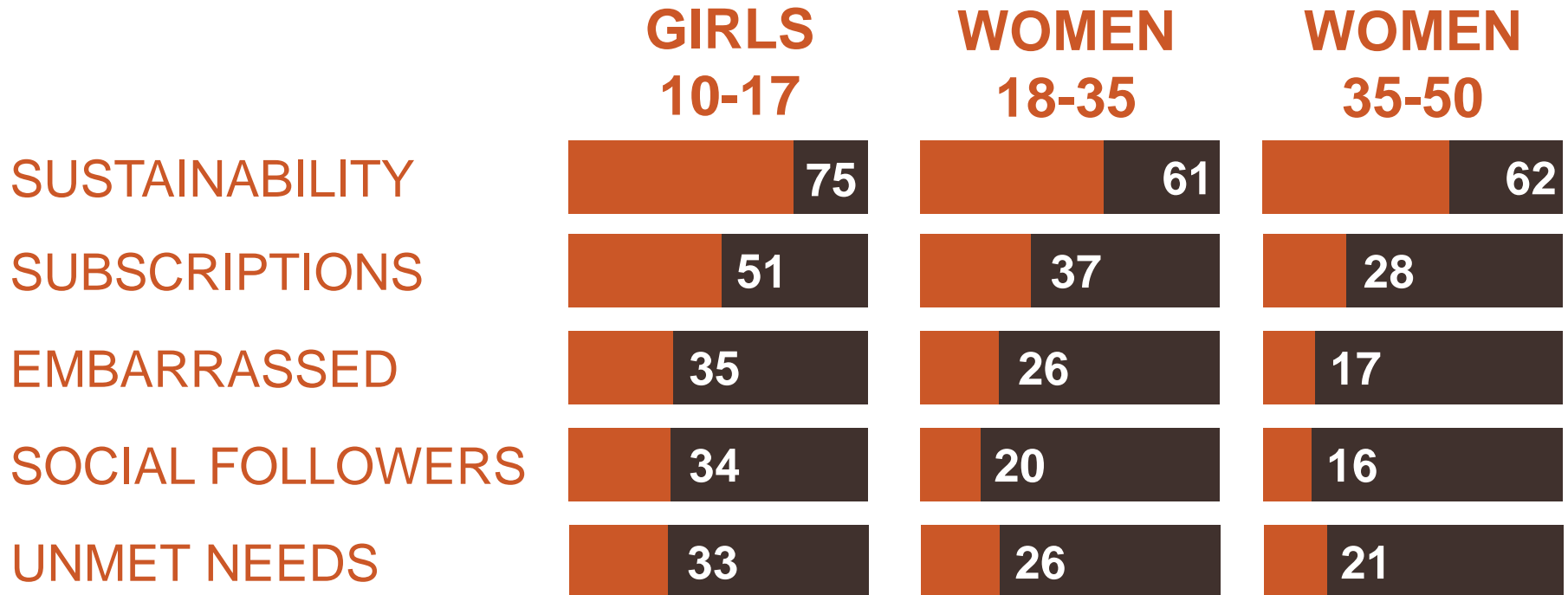
COMFORT
SOFTNESS
HYPOALLERGENIC



AFFORDABLE

PRICE

TOMORROW'S EUROPEAN* CUSTOMERS



SHOPPING HABITS



DIGITAL

DIGITAL OUTREACH
REMAINS AN
UNTAPPED
OPPORTUNITY



LOYALTY

WOMEN ARE
VERY BRAND
LOYAL, ALTHOUGH
CAVEATS EXIST



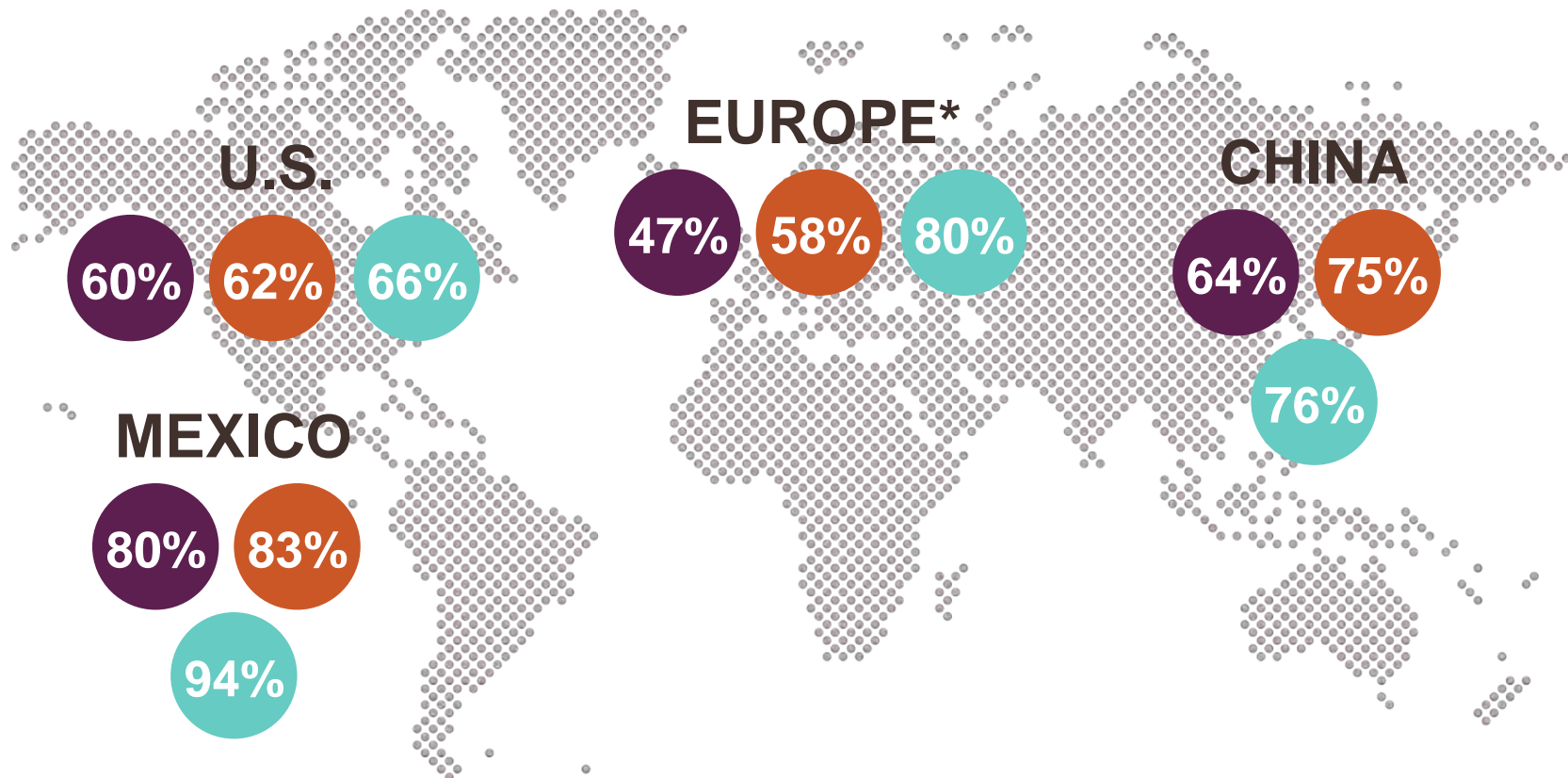
DRIVERS

PRODUCTS
MUST PERFORM
IN ORDER TO BE
CONSIDERED

OPPORTUNITIES



PRODUCT OPPORTUNITIES



Believe products are cotton



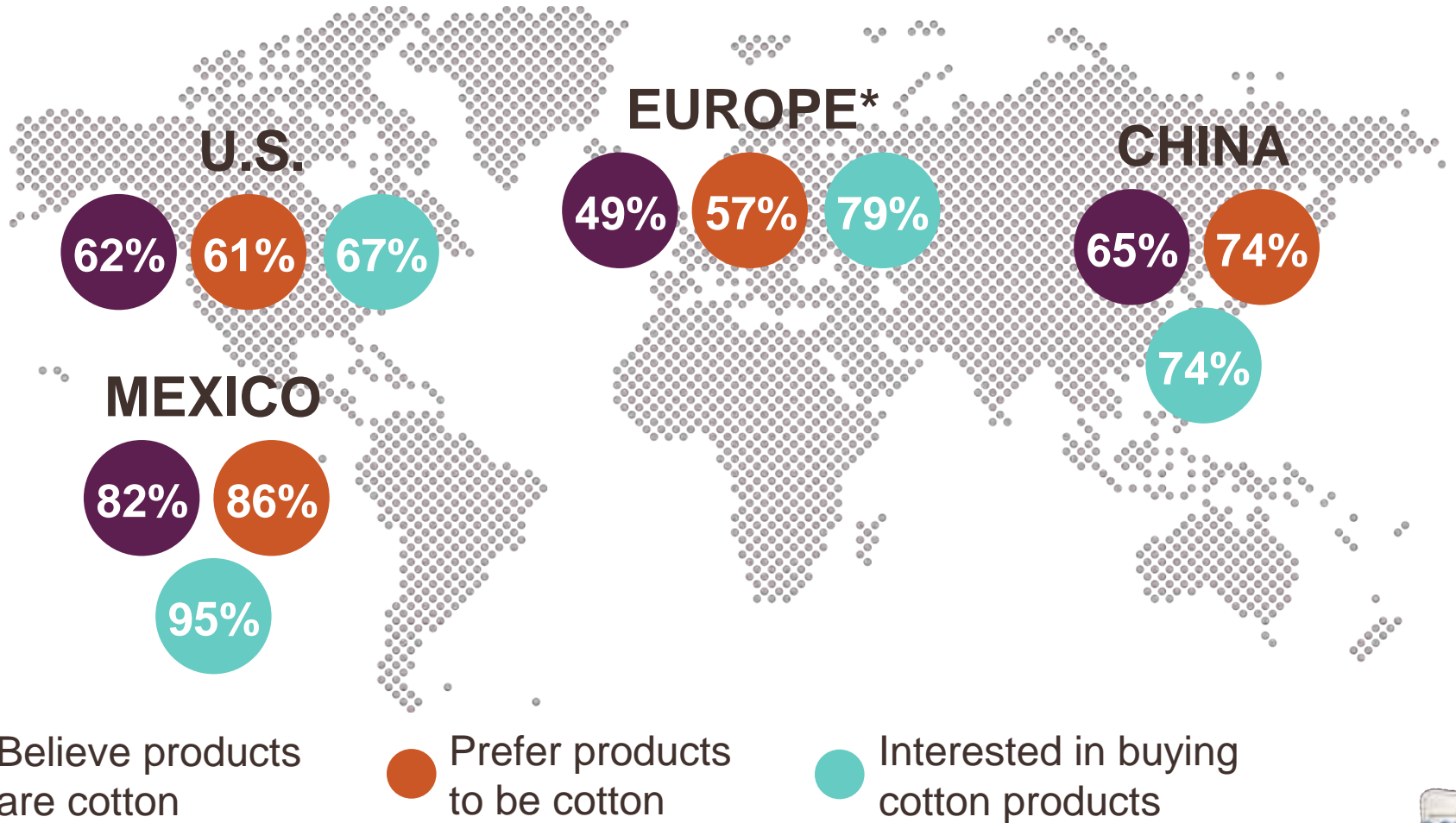
Prefer products to be cotton



Interested in buying cotton products



PRODUCT OPPORTUNITIES MILLENNIALS



Cotton Incorporated's 2015 U.S., Chinese, European, & Mexican Feminine Hygiene Studies

*Europe = UK, France, Germany, & Italy



CONSUMER PERCEPTIONS

Percent Saying Cotton Feminine Hygiene Products Would Perform **BETTER** Than Non-Cotton Products in the Following Ways

	U.S.	Europe*	China	Mexico
Softness	63%	57%	86%	86%
Comfort	60%	51%	86%	80%
Breathability	55%	51%	66%	73%
Hypoallergenic	54%	60%	87%	84%
Sustainability	51%	56%	78%	70%
Absorbency	48%	38%	80%	74%
Dry Near Skin	45%	40%	65%	69%
Leak Protection	41%	31%	62%	64%



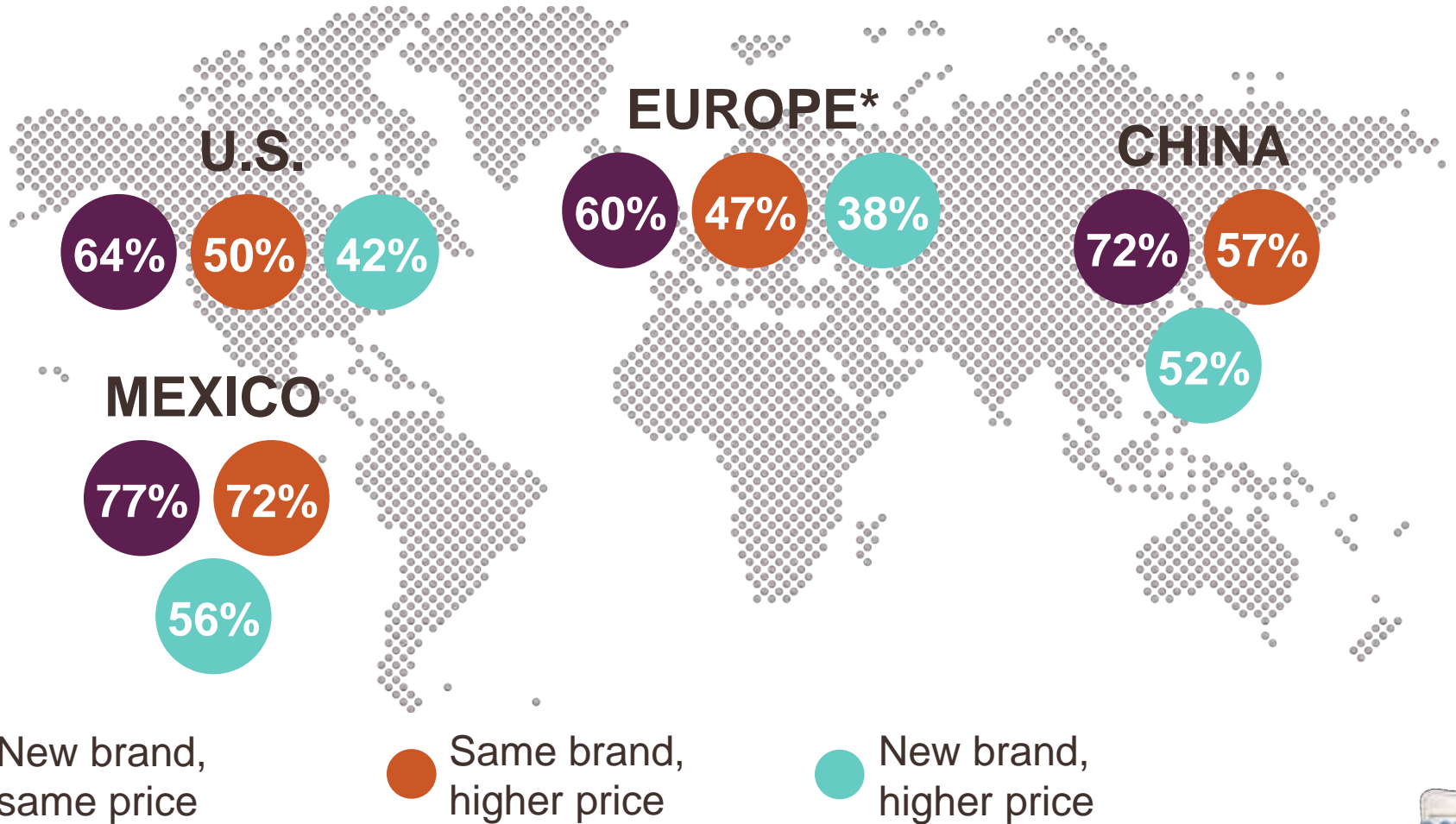
MILLENNIAL PERCEPTIONS

Percent Saying Cotton Feminine Hygiene Products Would Perform **BETTER** Than Non-Cotton Products in the Following Ways

	U.S.	Europe*	China	Mexico
Softness	60%	58%	84%	86%
Comfort	59%	52%	87%	81%
Breathability	52%	48%	63%	72%
Hypoallergenic	50%	59%	85%	84%
Absorbency	47%	38%	80%	75%
Sustainability	47%	54%	76%	69%
Dry Near Skin	43%	39%	62%	67%
Leak Protection	40%	31%	59%	64%



LIKELIHOOD TO PURCHASE COTTON PRODUCTS

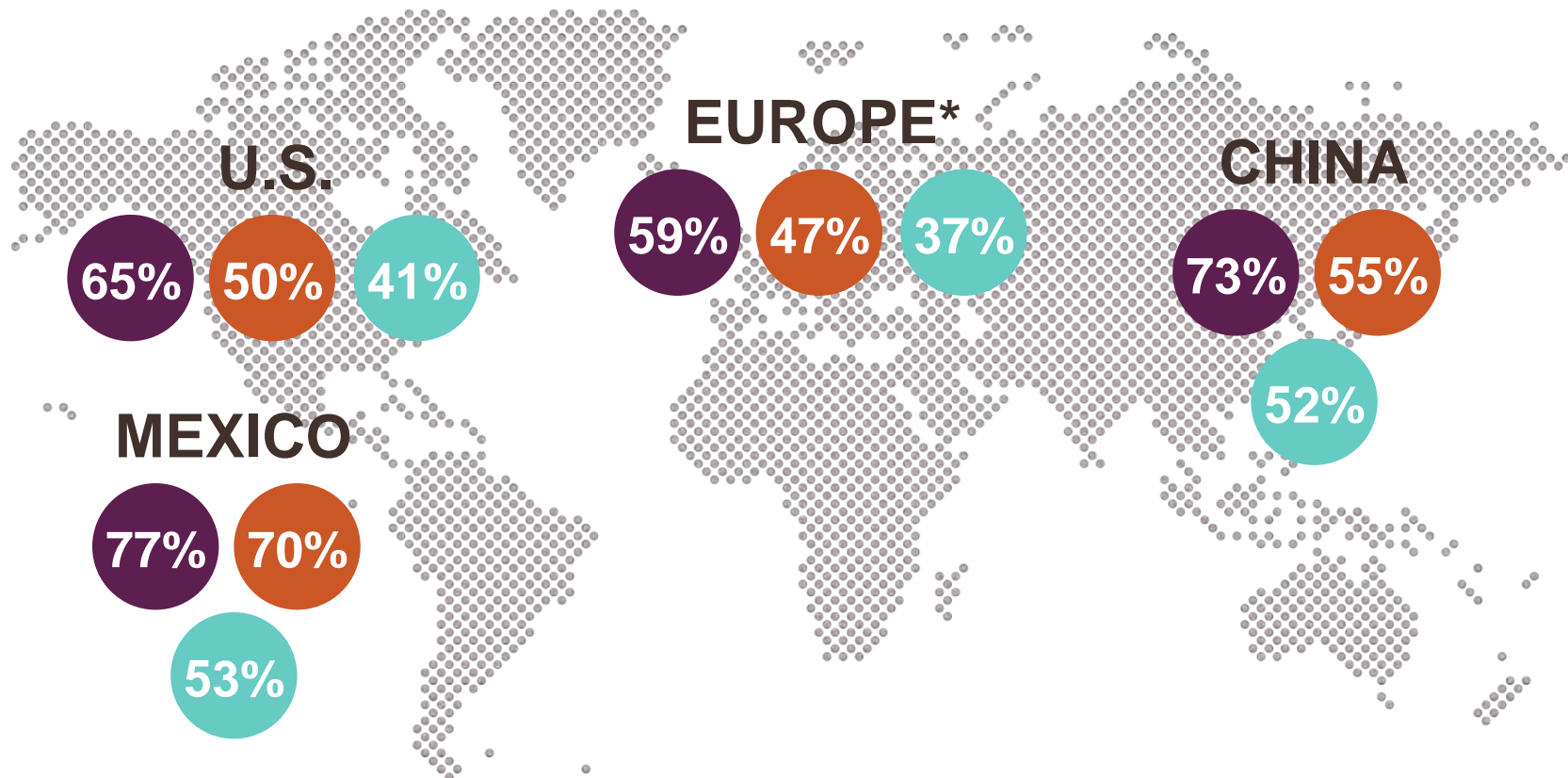


Cotton Incorporated's 2015 U.S., Chinese, European, & Mexican Feminine Hygiene Studies

*Europe = UK, France, Germany, & Italy



PURCHASING COTTON MILLENNIALS



New brand,
same price



Same brand,
higher price



New brand,
higher price



COTTON OPPORTUNITIES



INTEREST

STRONG
INTEREST IN
COTTON
ALTERNATIVES



FULFILLMENT

COTTON IS SEEN
AS BETTER
SUITED TO MEET
NEEDS



OPPORTUNITY

BENEFITS OF
COTTON CAN
BREAK BRAND
LOYALTY



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