

Our Aging Population

Meeting needs respectfully and profitably in the global
market for incontinence products

2016 - 2030





COTTON

UNIVERSITY™



Q&A

Type your questions in the Q&A window at any time during the webinar.



CottonUniversity.org

Find webinar slides and other nonwoven resources on the website later this week.

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GLOBAL INCONTINENCE MARKETS



**INDUSTRY
OUTLOOK**

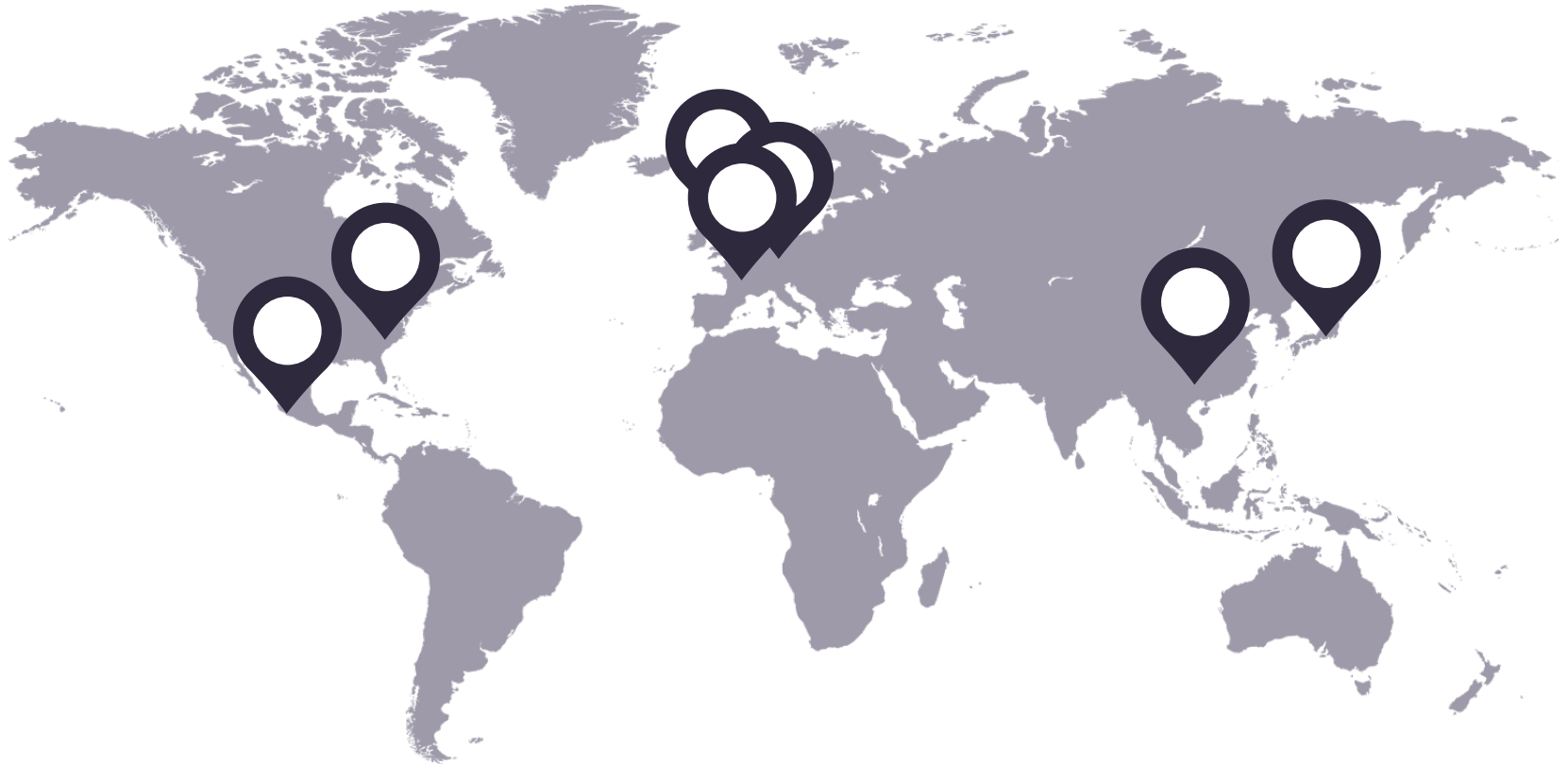


**CONSUMER
NEEDS**



**COTTON
POSSIBILITIES**

CONSUMER RESEARCH METHODOLOGY



U.S. | Mexico | UK | Germany | France | China | Japan

A woman with voluminous curly hair and white-rimmed sunglasses is smiling broadly, with her hands framing her face. She is standing on a rocky beach at sunset, with the ocean and waves visible in the background. The warm, golden light of the setting sun creates a soft glow around her hair and the scene.

INDUSTRY OUTLOOK

INDUSTRY OUTLOOK



ECONOMIC PROSPECTS



AGING POPULATIONS



OVERWEIGHT & OBESE POPULATIONS



SALES & TOP BRANDS



INDUSTRY TRENDS

ECONOMIC PROSPECTS

REAL GDP IN 2016 (TRILLIONS USD)

+ *GROWTH FROM 2016-2030*



\$75.7
+60%



\$18.3
+26%



\$16.6
+24%



\$11.7
+101%



\$4.2
+8%



\$1.2
+43%

AGING POPULATIONS



**POP. 65+
2016 (MM)**



**SHARE OF
WORLD**



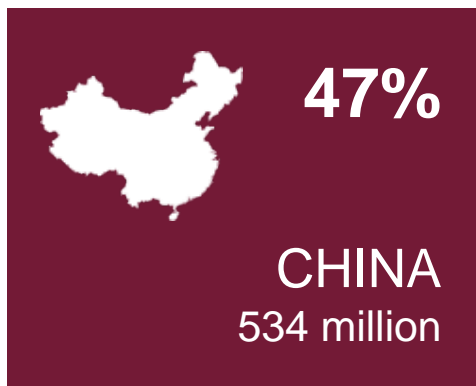
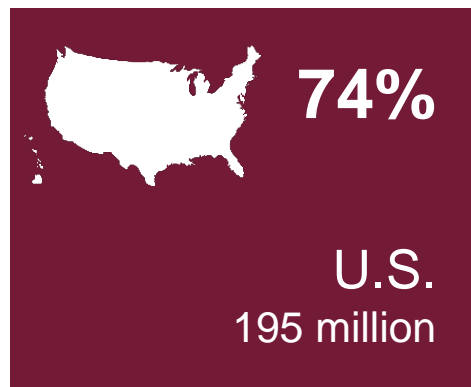
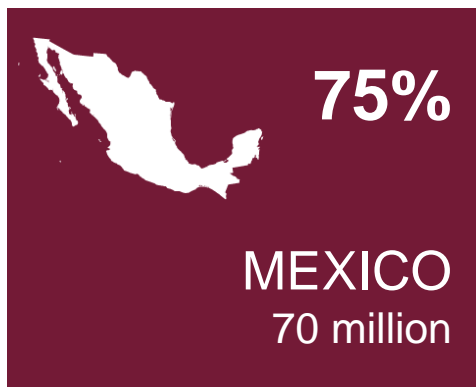
**GROWTH
2016-30**



**LIFE
EXPECT.**

China	140.0	22%	+76%	76
EU	96.7	15%	+27%	81
U.S.	49.4	8%	+51%	79
Japan	34.6	6%	+6%	84
Mexico	8.6	1%	+80%	77

OVERWEIGHT & OBESE POPULATIONS



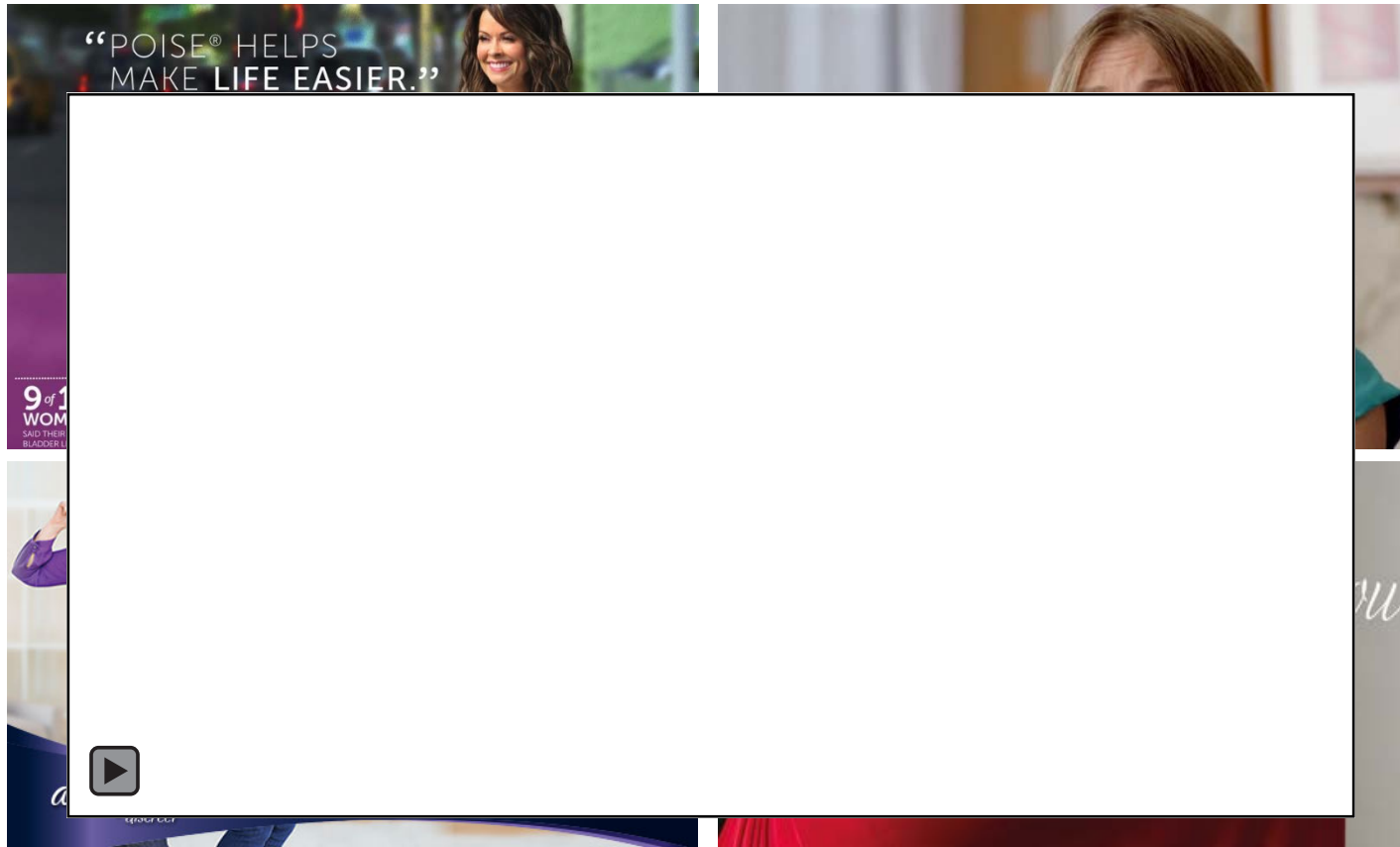
*Share & Size of
Overweight &
Obese Population
in 2016*

INCONTINENCE PRODUCT SALES

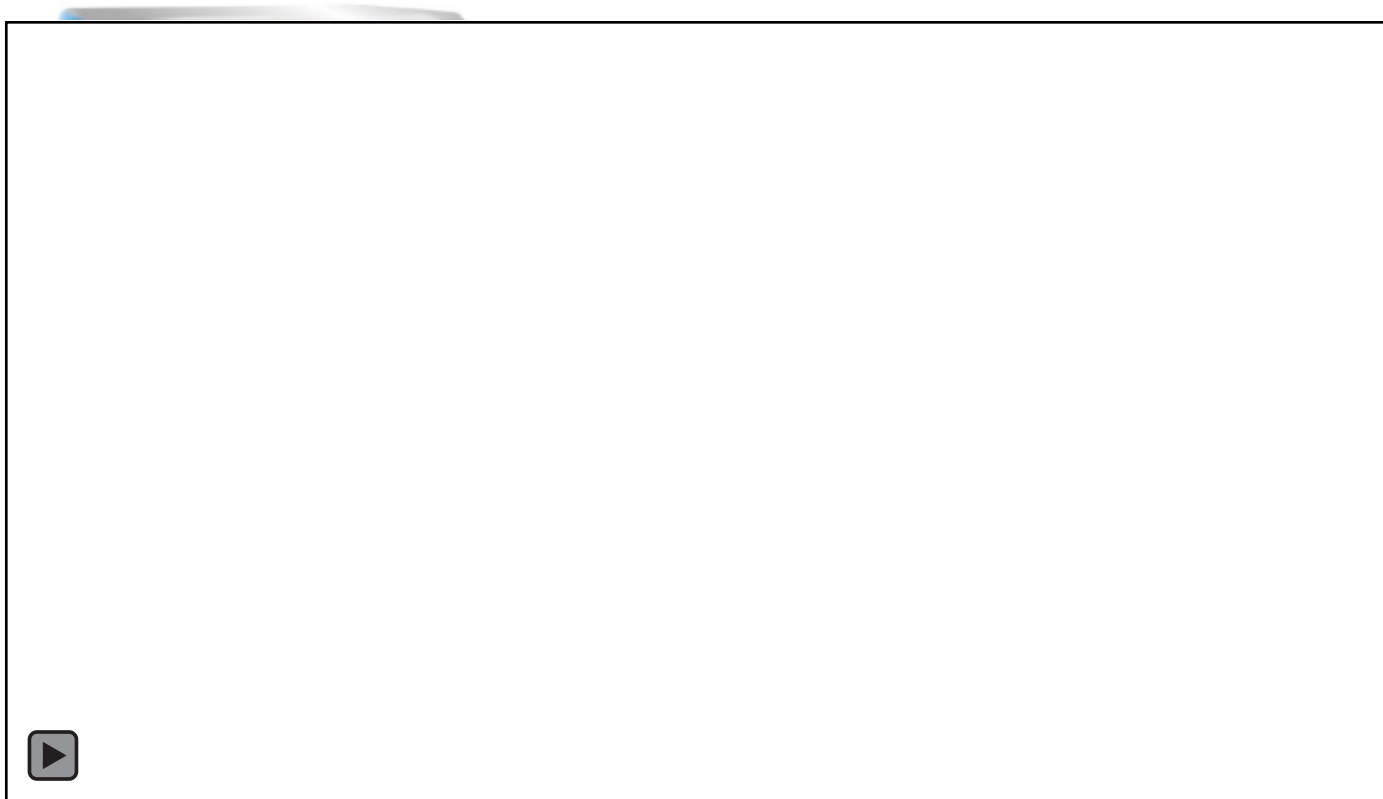
INCONTINENCE PRODUCT SALES (MILLIONS USD)

	2016	2020	Growth 2016-20
U.S.	1,952.6	2,672.0	+37%
Japan	1,656.4	1,977.0	+19%
Germany	336.0	373.3	+11%
France	313.5	337.3	+8%
UK	295.9	347.7	+18%
China	293.7	634.4	+116%
Mexico	131.2	178.0	+36%

ELIMINATING THE STIGMA



MALE MARKETING




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depend.com Call
1.800.558.6423

INDUSTRY OUTLOOK



Economic growth coupled with aging & overweight populations expected to boost sales



Sales projected to be strong, offering opportunities for established and disrupter brands alike



Fresh thinking regarding product design and positioning that makes these products a normal part of everyday life will lead to breakout success and market share gains.



CONSUMER NEEDS

CONSUMER NEEDS



PRODUCT USAGE HABITS



PRODUCT OPPORTUNITIES



SHOPPING HABITS



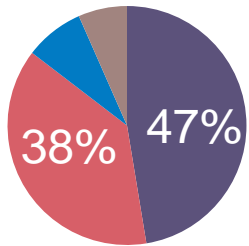
PURCHASE DRIVERS



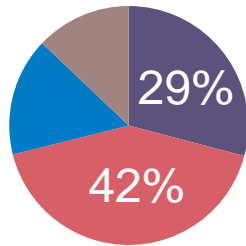
NEEDS VERSUS SATISFACTION

PRODUCT USAGE

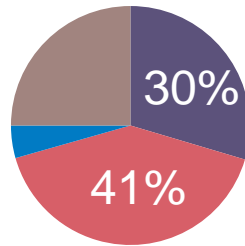
PRODUCTS USED MOST OFTEN TO HANDLE INCONTINENCE



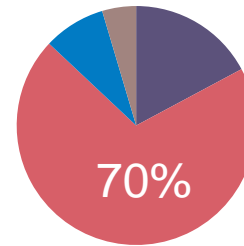
U.S.



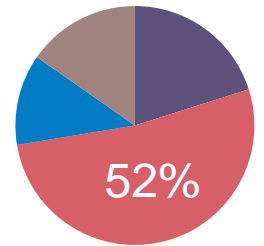
Europe*



Japan



China

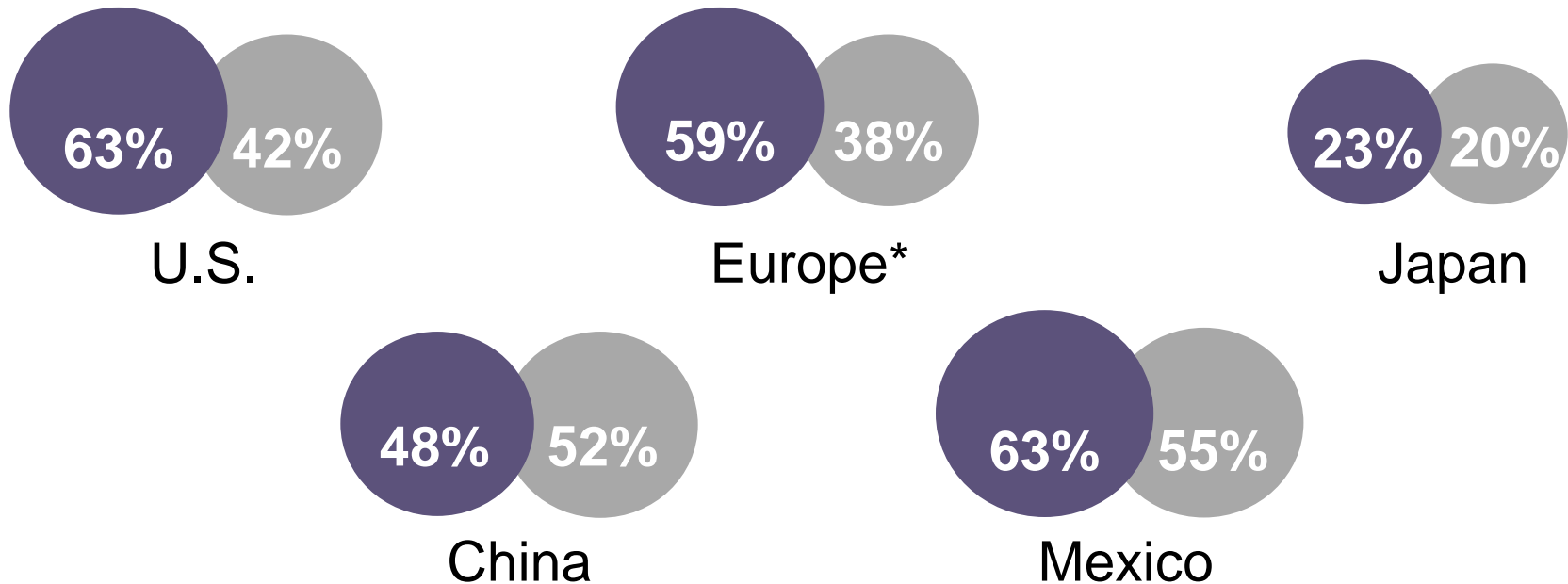


Mexico

■ Incontinence ■ Multiple ■ Hybrid ■ Feminine Hygiene

PRODUCT SATISFACTION

PERCENT VERY SATISFIED WITH PRODUCT PERFORMANCE**



● Incontinence Products ● Other Products

CONVERTING FEMININE HYGIENE USERS

PERCENT SAYING FEMININE HYGIENE PRODUCTS MEET ALL
OF THEIR INCONTINENCE NEEDS**



U.S.
28%



Europe*
33%



Japan
37%



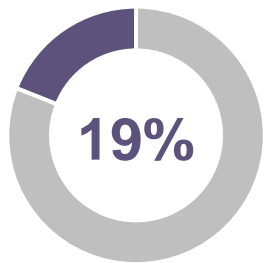
China
16%



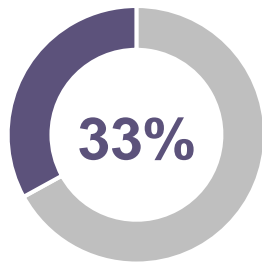
Mexico
33%

DIY INCONTINENCE PRODUCTS

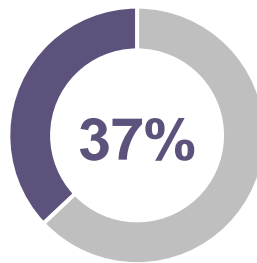
PERCENT SAYING THEY ALWAYS OR USUALLY WEAR MULTIPLE PRODUCTS AT ONCE TO HANDLE INCONTINENCE ISSUE



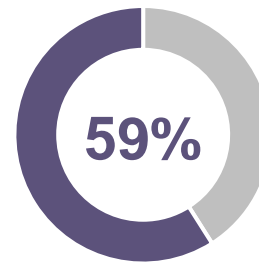
U.S.



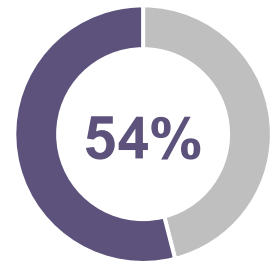
Europe*



Japan

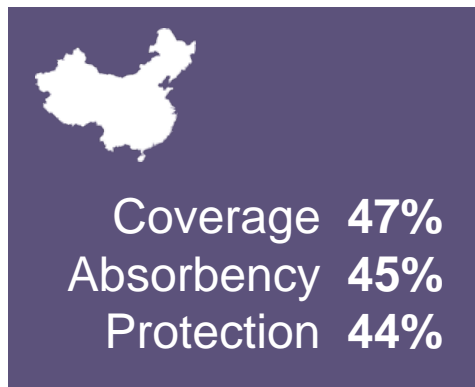
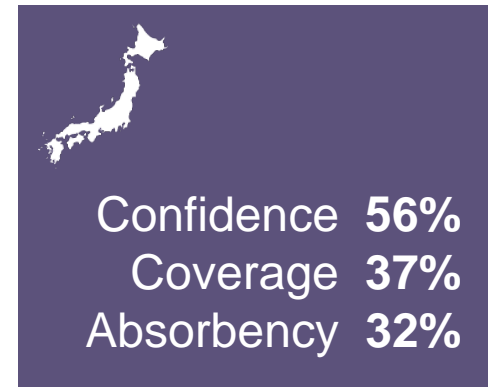
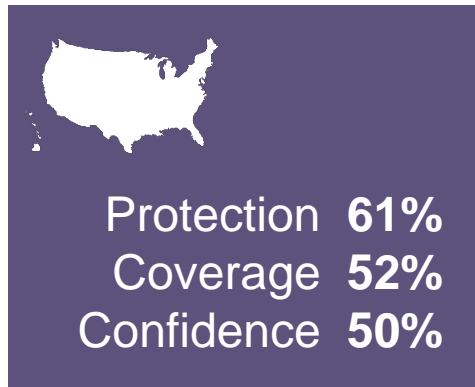


China



Mexico

DIY INCONTINENCE PRODUCTS



*Top reasons why women combine multiple products***

INFORMATION SOURCES

MOST INFLUENTIAL SOURCES OF INCONTINENCE PRODUCT INFORMATION AMONG GLOBAL* WOMEN



DOCTORS

33%



STORE
DISPLAYS

33%



ADS

32%



FAMILY &
FRIENDS

27%

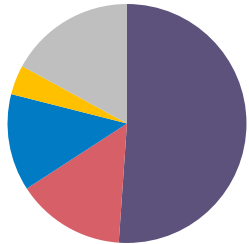


ONLINE
SOURCES

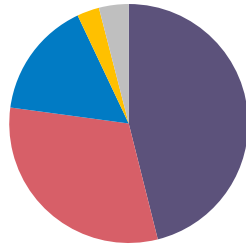
26%

CHANNELS SHOPPED

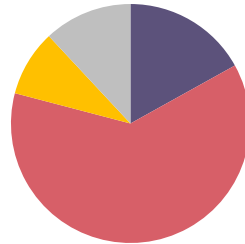
CHANNELS SHOPPED FOR MOST INCONTINENCE PRODUCTS



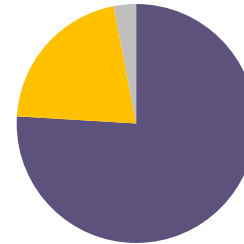
U.S.



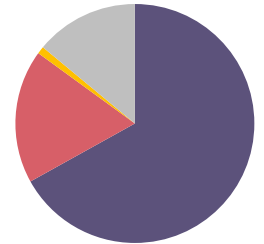
Europe*



Japan



China



Mexico

■ Mass Merchants ■ Drug Stores ■ Grocery ■ Online ■ Other

PURCHASE DRIVERS



PRIMARY

no leaks | absorbency |
odor control | comfort |
stays dry | discreet
when wearing |
hypoallergenic | fit



SECONDARY

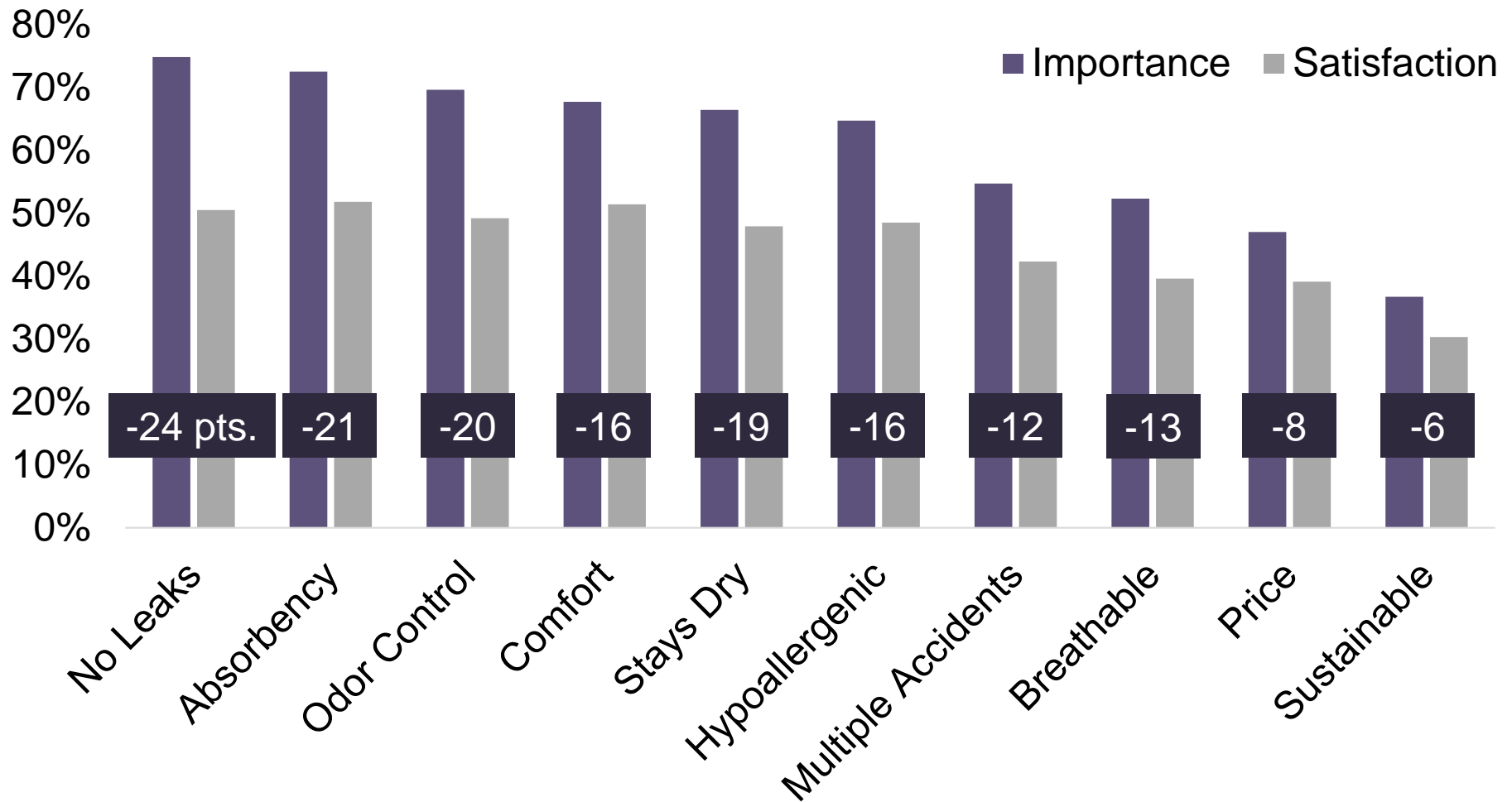
easy use | not bulky |
handles many accidents |
discreet disposal &
storage | breathable |
quiet



OTHER

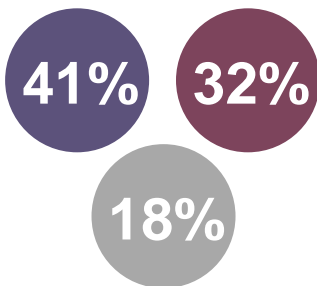
price | natural |
packaging |
sustainable | shape |
color & design

DRIVERS VERSUS SATISFACTION

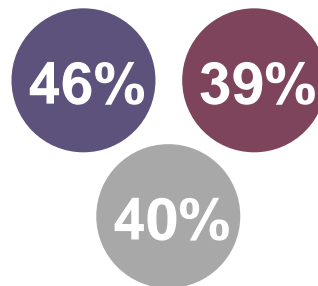


THE NEXT GENERATION

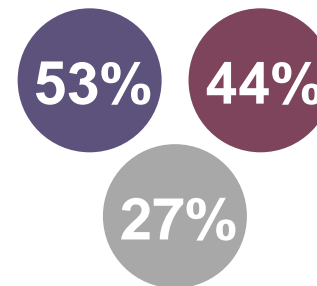
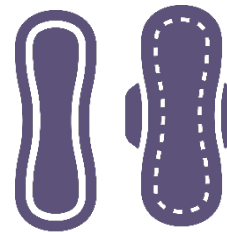
Use Online Information



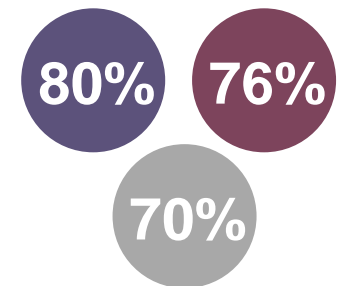
Natural Matters



Combine Products



Fiber Info Influential



● Millennials ● Gen X ● Boomers


CONSUMER NEEDS



Sales growth, along with customer satisfaction, will hinge on converting feminine hygiene product users



Take advantage of product combination habits



Digital outreach key to reaching Millennials & developing market customers



Gaps between feature importance and satisfaction indicate opportunities for product improvements

A woman with long brown hair, wearing sunglasses and a headband with red flowers, is sitting on a sandy beach. She is playing a small acoustic guitar. A baby, wearing a straw hat with a blue and white striped band and a blue and white striped shirt, is sitting on the sand, looking up at the woman. The background shows a sunset over the ocean with a bright sun low on the horizon.

COTTON POSSIBILITIES

COTTON POSSIBILITIES



COTTON'S POSITION



PERFORMANCE EXPECTATIONS

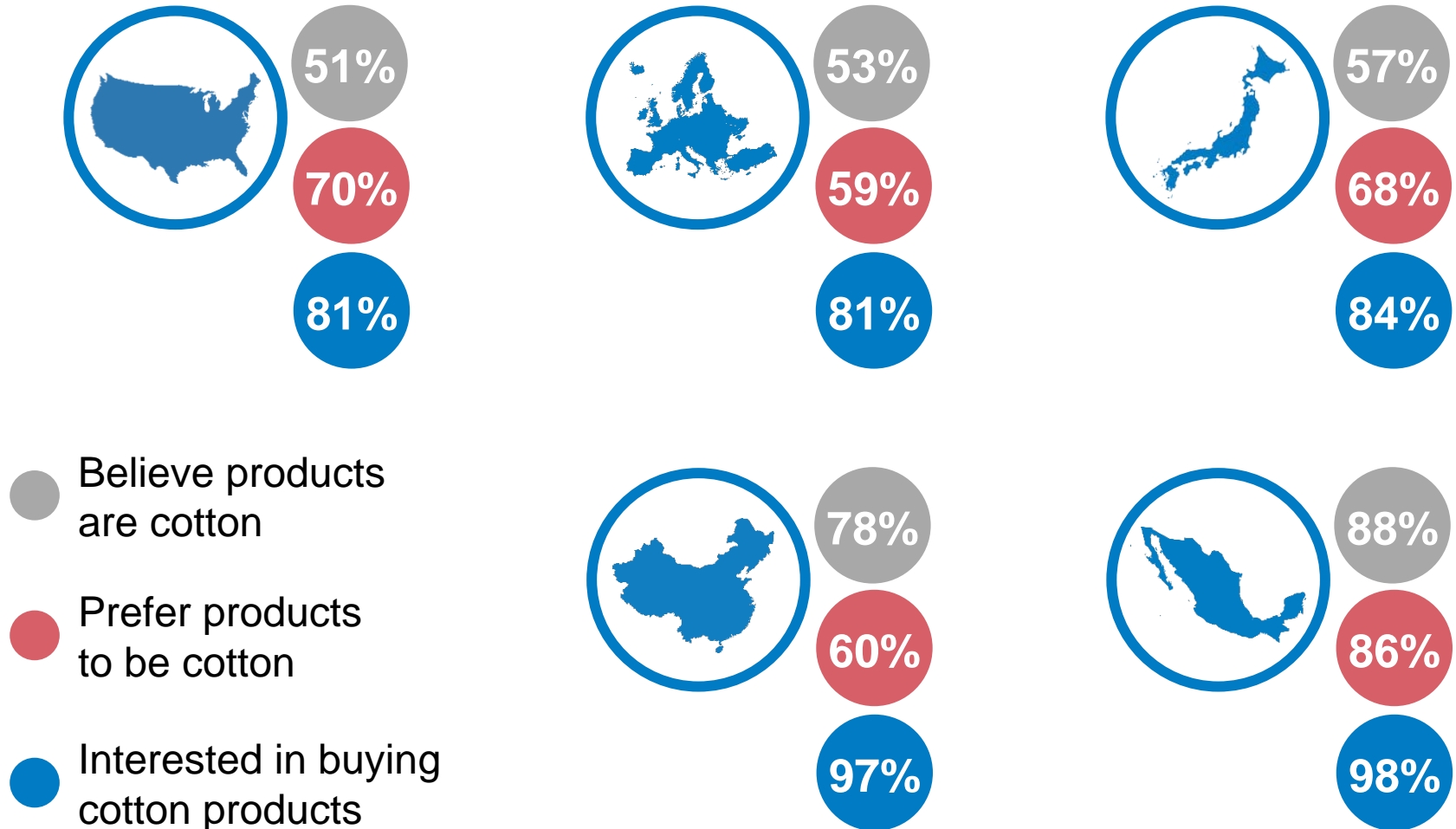


PURCHASE INTENT

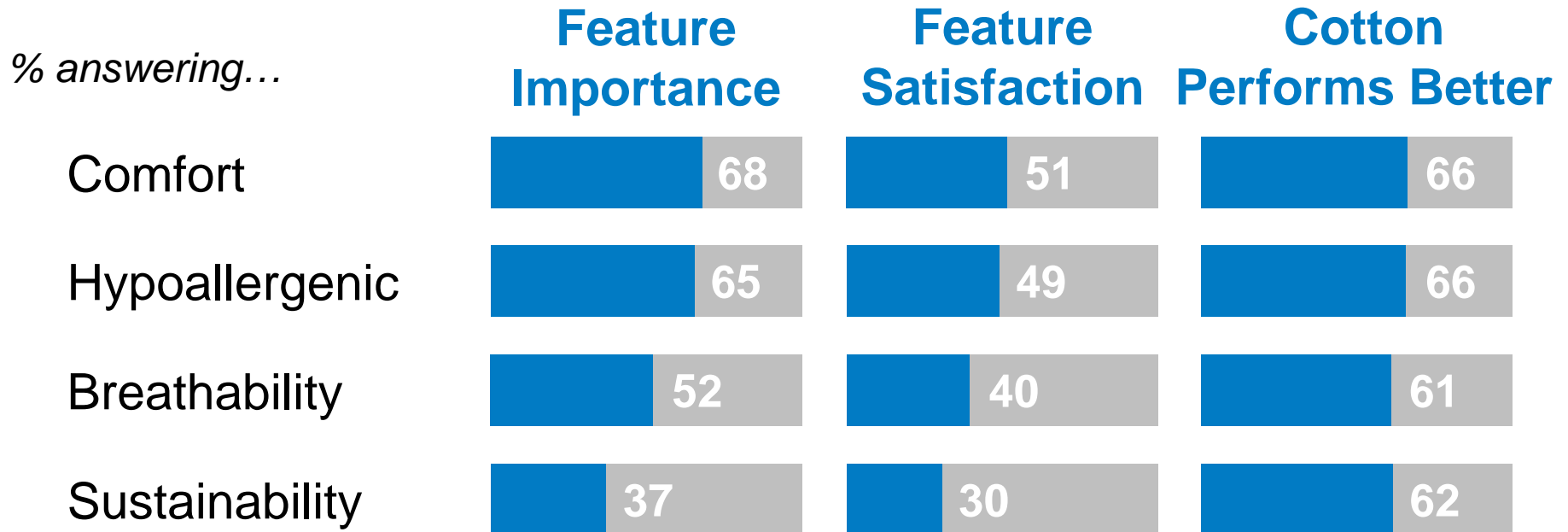


BREAKING BRAND

COTTON'S POSITION

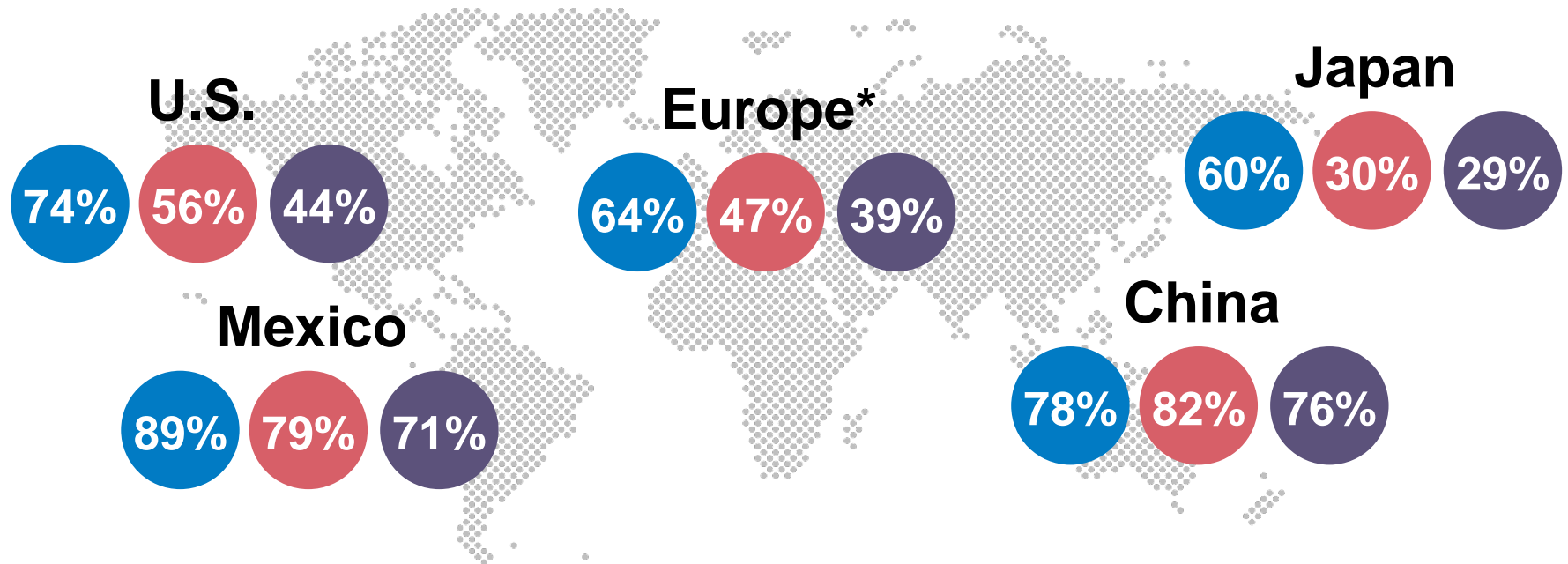




COTTON FILLING THE SATISFACTION GAP



COTTON PURCHASE INTENT

LIKELIHOOD TO PURCHASE COTTON PRODUCTS THAT ARE...



-  New brand, same price
-  Same brand, higher price
-  New brand, higher price

COTTON PURCHASE INTENT

LIKELIHOOD TO PURCHASE COTTON PRODUCTS THAT ARE...



New brand,
same price



Higher price,
same brand




New brand,
higher price

● Millennials ● Gen X ● Boomers

COTTON POSSIBILITIES



Interest in cotton alternatives is strong worldwide



Cotton is seen as better suited to meet primary incontinence product needs, helping to fill the satisfaction gap



Benefits of cotton can break brand loyalty, especially with younger women

THANK YOU





Please submit all final questions now.

Questions may be submitted to the right of the presentation screen.



NEW NONWOVENS CONTENT

Raw Materials Used in Nonwovens

Nonwoven Materials & Structures: Fiber Orientation & Basis Weight

**WE'RE GETTING
A NEW NAME
AND A NEW LOOK.**

**COMING
2018**

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Q&A Session

*Please take our quick survey before exiting.

