

PERIOD CARE DATA & TRENDS

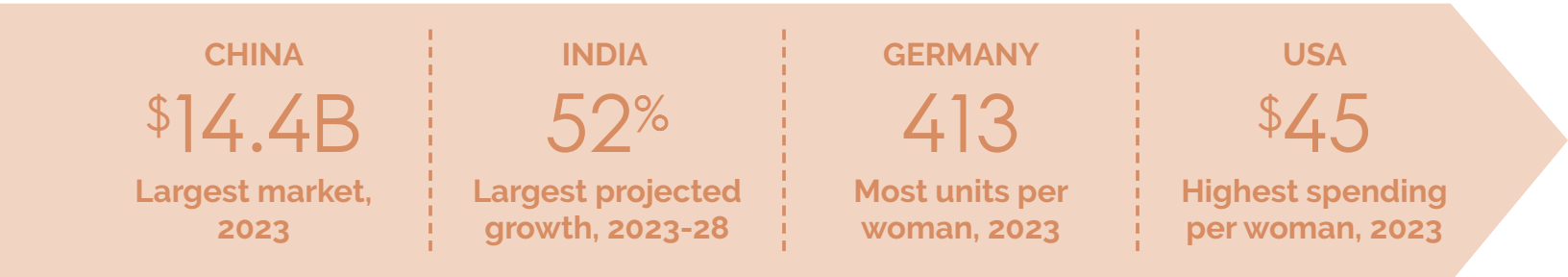
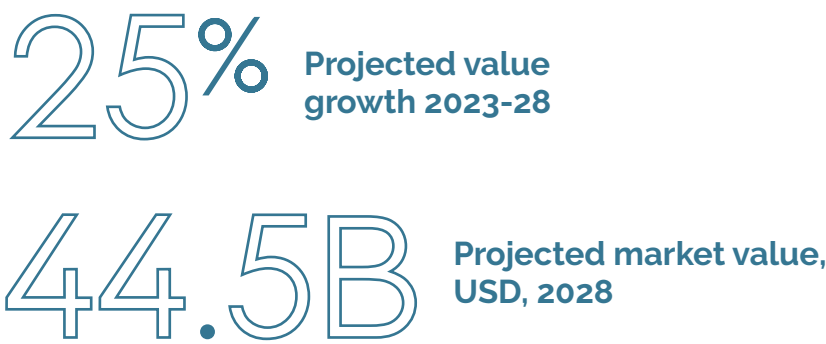


Find out more at CottonWorks.com/PeriodCare,
or reach out to your cotton consultant at Nonwovens@CottonInc.com

Global market overview¹

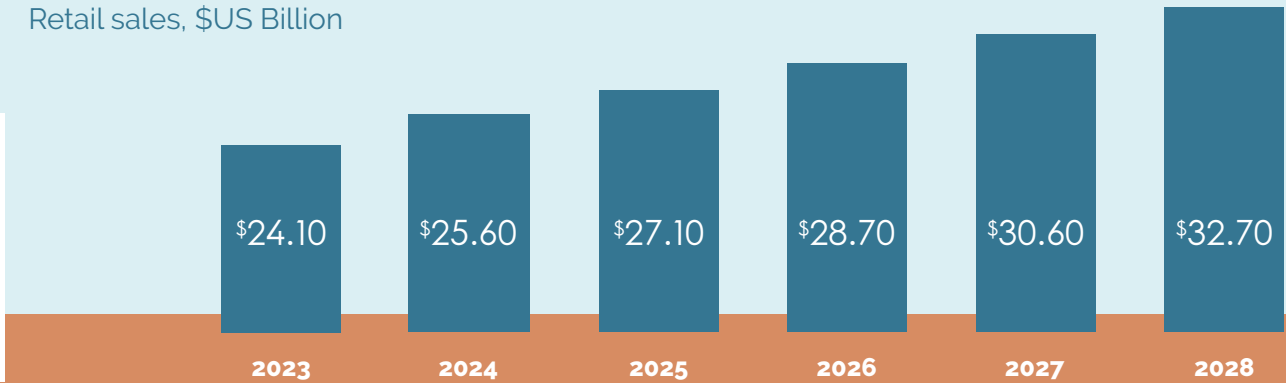
Brands in the period care industry have a big responsibility and equally big opportunities. From tampons to pads, pantliners to reusables, customers rely on period care products for almost half their lives – and tend to remain brand-loyal. But as the industry shifts to view period care as self-care, customers are

reevaluating the products they use to ensure they fit their bodies, lifestyle, and values. To be a top choice in today's global marketplace, brands must optimize convenience, outperform in function, and take a stand on sustainability.



Global menstrual care expenditure 2023 and expected 5-year growth¹

Retail sales, \$US Billion



Period care overview²



Data surveyed from 6,750 women aged 16-49 across 9 countries

Three life stages of period care²



92% of women seek more information about period care products



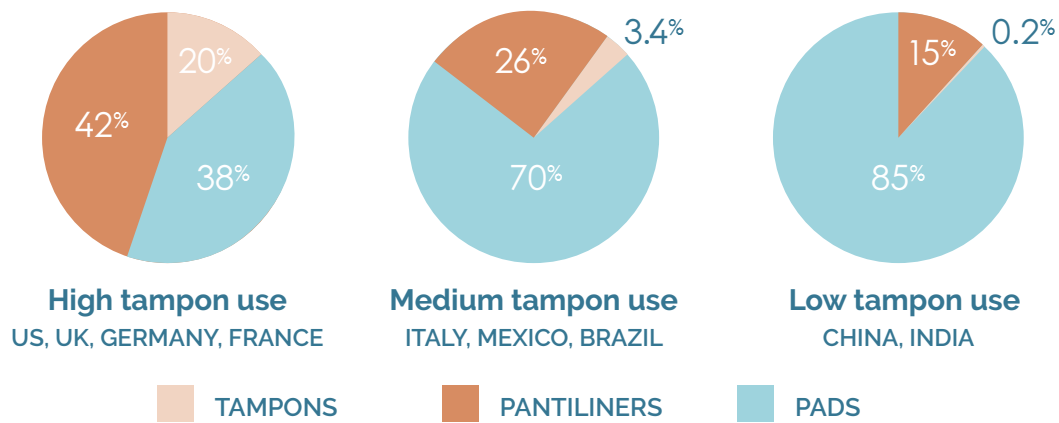
Consumer preferences³

When asked which fiber they most preferred tampons to be made of, 87% of U.S. consumers identified cotton as their fiber of choice.



Product use

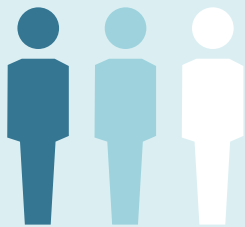
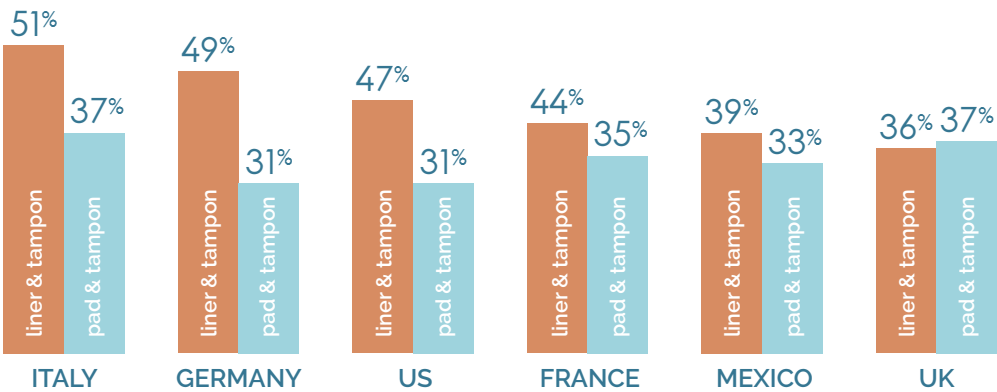
Period care product use varies globally, giving brands an opportunity to more effectively target their marketing and product education based on consumer behavior.



Cotton Incorporated's 2020 Global Hygiene Study

Combo products

Three quarters of global tampon users report combining different kinds of period care products – on average, almost three per cycle. For brands, this opens the door for mixed product packages, new promotions, and consumer education. Tampon brands without complimentary pad or liner products may want to consider line extensions.



- US, 20-29s GROUP

"They're not made out of cotton? I feel like this shouldn't be the first time I'm finding out what I'm putting inside my vagina every month."

Nearly half of tampon users always or usually use a pantliner when using a tampon

About a third of tampon users always or usually use a pad when using a tampon

Purchase drivers

Performance is paramount when it comes to period care. The products customers trust must be **absorbent, protect against leaks, and be comfortable.** To be competitive, brands must deliver in every category.



Purified cotton is naturally hypoallergenic, highly absorbent, and durable when wet



Cotton Incorporated's 2020 Global Hygiene Study

*Pads and pantliners only

Brand loyalty

When it comes to period care products, consumers are generally brand loyal – **but they're open to trying new.** Across markets, opportunities exist for new concepts in product development, channels of distribution, and target marketing.



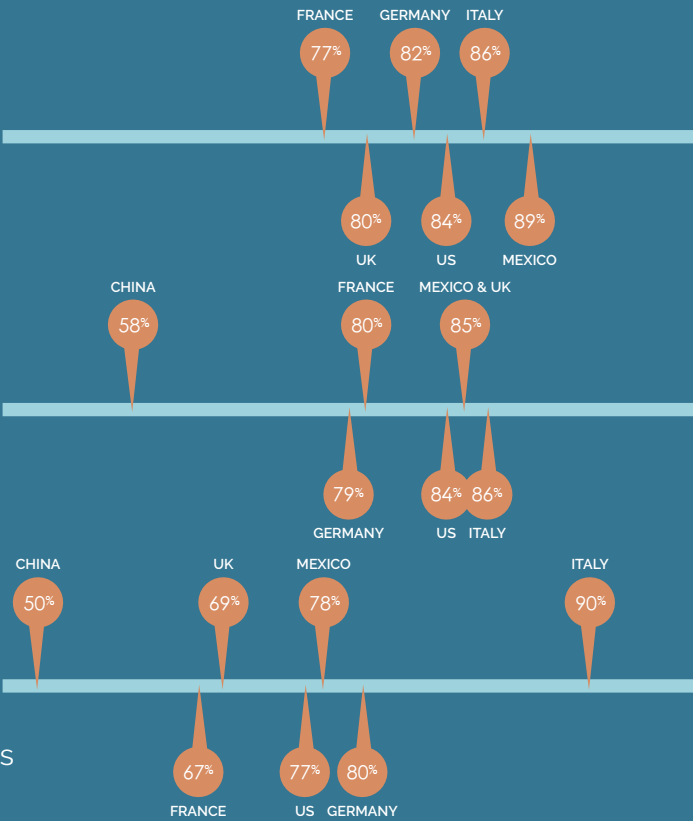
THE TOP 3 TAMPON BRANDS account for 4 in 5 purchases made by women in the following countries



THE TOP 3 PAD BRANDS account for 4 in 5 purchases in the US, Europe, and Mexico and the majority in China



THE TOP 3 PANTLINER BRANDS account for half or more of the purchases made by women in the following countries



Health & sustainability

As concern for sustainability grows, consumers are reconsidering how period care products affect the health of their bodies and the planet. Today, **more than 80% of women** report concern about plastics from period care products making their way into rivers and oceans.

Globally, a majority of women want more information about what is in their period care products

86%
CHINA & INDIA

78%
MEXICO & BRAZIL

67%
FRANCE & ITALY

51%
US, UK & GERMANY

Cotton Incorporated's 2020 Global Hygiene Study



The solution to synthetics

Cotton rates high in the key attributes consumers care about. As a natural fiber grown from the earth, it is a skin-safe, renewable alternative to synthetics in period care products. In fact, the majority of women say they prefer their period care products be made from cotton and are willing to switch brands and pay a higher price for the fiber.

SOFTEST TO TOUCH

84%

16%

NATURAL

82%

18%

RELIABLE

78%

22%

HYPOALLERGENIC

69%

31%

SUSTAINABLE

67%

33%

MOST COMFORTABLE

82%

18%

COTTON IS BEST MANMADE FIBERS ARE BEST

Cotton Incorporated's Lifestyle Monitor™ Survey 2024



The majority of women say they prefer their feminine hygiene products to be made from cotton

83%

MEXICO⁴

75%

CHINA⁵

62%

US⁶

58%

EUROPE⁴





To feature the Seal of Cotton trademark on your products,
contact your Cotton Incorporated account representative.

**Find out more at CottonWorks.com/PeriodCare,
or reach out at Nonwovens@CottonInc.com**

Cary

New York

Hong Kong

Shanghai

Mexico City



**Cotton
Incorporated**

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¹ 2023 Euromonitor International, Tissue & Hygiene Passport Data

² Cotton Incorporated's 2020 Global Hygiene Study

³ Cotton Incorporated's Lifestyle Monitor™ Survey 2024

⁴ Cotton Incorporated's 2015 European & Mexican Feminine Hygiene Study surveyed 500 feminine hygiene product users ages 10-50 in the UK, Germany, France, Italy, and Mexico. Respondents were representative of their respective populations.

⁵ Cotton Incorporated's 2015 Chinese Feminine Hygiene Study surveyed 500 feminine hygiene product users ages 18-45 across 16 cities covering all four major tiers and regions in China. Respondents were representative of the Chinese population

⁶ Cotton Incorporated's 2015 U.S. Feminine Hygiene Study surveyed 1,000 feminine hygiene product users ages 18-50. Respondents were representative of the U.S. population.