



Research

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.

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.

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.



GLOBAL

CONSUMER

SOLUTIONS



Feminine Hygiene

Global
HYGIENE
UNITIES

Global
FEMININE
OPPORT



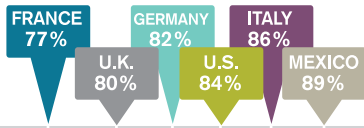
Brand LOYALTY

Brand Loyalty is very strong across markets, but opportunities exist for new concepts in product development, channels of distribution and target marketing.

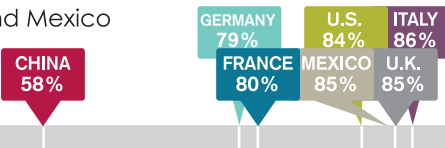


8 IN 10 WOMEN say they generally stay with the same brands of feminine hygiene products.

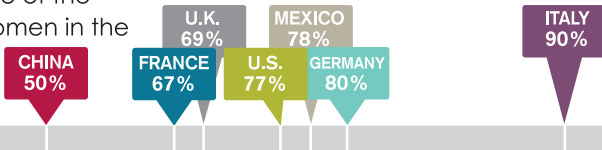
The top 3 tampon brands account for 4 in 5 purchases made by women in the following countries.



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 brands of pantliners account for half or more of the purchases made by women in the following countries.



Performance IS IMPORTANT

Regardless of demographics or market studied, feminine hygiene products must prevent leaks, be absorbent, keep skin dry, and be functional (such as sticking to underwear, not being visible, not being bulky, etc.) AND be comfortable, soft, and hypoallergenic in order to be considered by women globally.



Purified cotton is highly absorbent: 24 grams water/gram of fiber

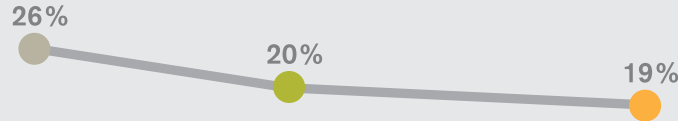
Cotton is naturally hypoallergenic

Cotton is strong: Wet strength is 3.7 times stronger than pulp

Social Media Marketing is greatly underutilized as a customer engagement tool.

About 1 in 5 women say they follow feminine hygiene brands on social media sites.

In the US, women mainly follow these social media sites for coupons and promotions.

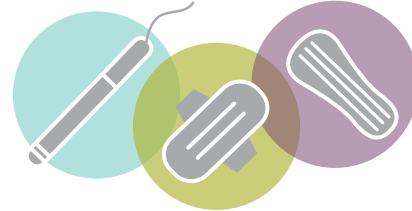


Reaching out to consumers about your brand, new product launches, etc. through social media is essential in retailing today across categories. There is a major untapped opportunity for feminine hygiene brands to utilize social media to develop a stronger relationship with their customers beyond point of sale and entice new customers to try their products.

Social

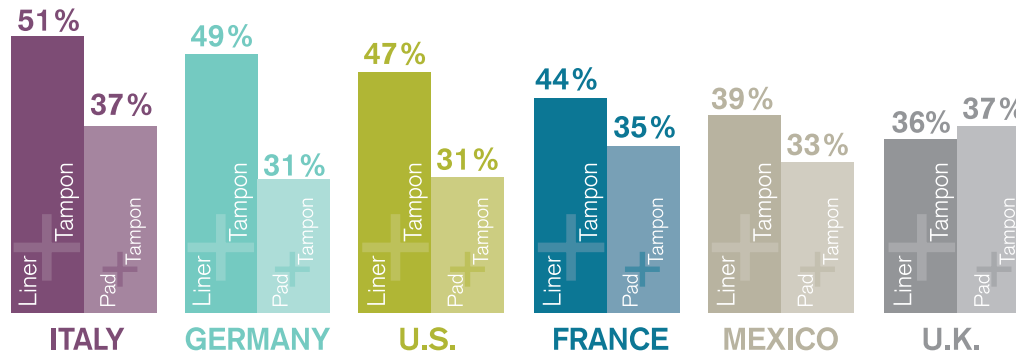
Combo PRODUCTS

A sizeable share of tampon users are combining products – offering opportunities for mixed product packages, new promotions, and/or consumer education.



Nearly half of tampon users in these countries say they always or usually use a pantliner when using a tampon.

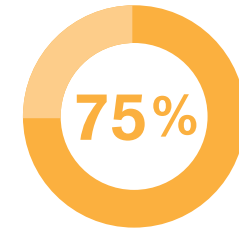
About a third of tampon users always or usually use a pad when using a tampon.



Opportunities exist to take advantage of this trend by creating mixed product boxes or offering promotions around buying two different types of feminine hygiene products at the same time. Tampon brands without complementary pad/liner products may want to consider line extensions.

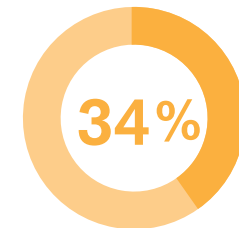
Young CONSUMERS

More sustainable offerings, product subscriptions, and engagement through social media will be essential to appeal to tomorrow's feminine hygiene shoppers.

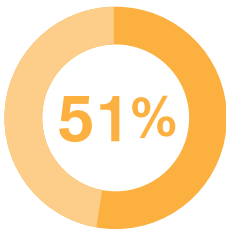


3 in 4 European girls ages 10-17 say they are very interested in feminine hygiene products that are made from natural or sustainable materials, significantly higher than the overall market.

Half of European girls ages 10-17 say they would be interested in a subscription service that delivers feminine hygiene products to their door once per month, a Millennial characteristic.



A third of European girls ages 10-17 say they follow feminine hygiene brands on social media, again higher than the overall market. Using social media as a tool to educate, entertain, and build a relationship with young women is essential for any established brand or new entrants.



THE Cotton DIFFERENCE

Women see cotton as better suited than manmade fibers in meeting their primary feminine hygiene needs of performance and comfort.

Most women are willing to switch brands and/or pay a slightly higher price to purchase cotton feminine hygiene products.

The majority of women say they are willing to switch brands to purchase cotton feminine hygiene products if they knew those products were more comfortable, hypoallergenic, and sustainable.



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

