



SUSTAINABLE PERIOD CARE

SEARCH & SOCIAL TRENDS: 2022

Understanding consumer attitudes towards the boom in sustainable menstrual products

curated

PUTTING PERIODS IN THE SPOTLIGHT

Far from shying away from what once was a taboo subject, brands — and consumers — are putting periods in the spotlight more than ever.

From TV ads that put the focus back on reality, like brands using real blood in their ads as opposed to the blue liquid we'd come to accept as standard, to new brands springing up to answer consumer concerns around sustainability, the period industry boom is real.

Spurred on by the pandemic, sustainable alternatives to period care have exploded. In this report, we explore why, and who is driving this upward trend.

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Why now? The State of the Nation



THE STATE OF THE MARKET

The market size of the industry is predicted to hit **52 billion USD by 2023**, a considerable growth from its size in **2018 of 37.4 billion USD**.

Google search data highlights the growth in demand globally, with India seeing a faster growth rate than the global average during this period.

+124%

Increase in 'menstrual cups' searches **globally** from July 2018 to July 2021



+397%

Increase in 'menstrual cups' searches in **India** from July 2018 to July 2021

Reasons behind this market growth include:

- Increased education amongst Indian populations using menstruation products.
- A growth of hygiene-related initiatives to support sales.
- The shifting conceptions of menstruation products.
- Charitable organisations play a role in increasing awareness and use of sustainable period products. This is exemplified by the Government of India, who in 2019, announced the price reduction of 'Jan Aushadhi Suvidha Oxo-Biodegradable Sanitary Napkins' to INR 1 per pad, from INR 2.5.

What the future holds for the industry:

Over the medium term (next five years):

- Increasing awareness about period health and hygiene with a higher availability of products.
- Demand is expected to grow at a slower rate in regions within the Global North, such as in the UK and Western Europe. Due to factors such as a higher initial awareness rate amongst these populations.

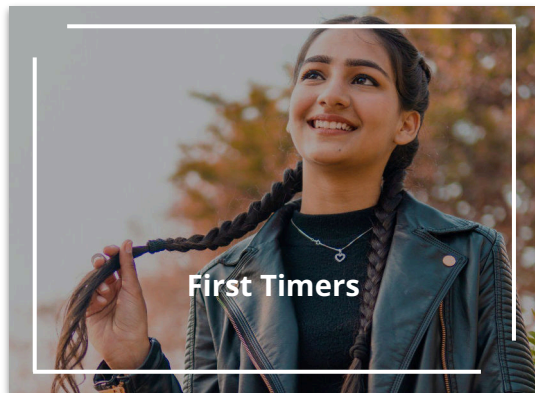
03

Period Pull Factors: The 6 Customer Personas



THE PERIOD PERSONAS

Sustainable period care is not a one-size-fits-all solution. Different people have different needs; it comes down to individual preference and user intent.



THE HEALTH & COMFORT CONSCIOUS

Persona Values: Comfort | Safety | Eco as an afterthought

Over the last couple of years, **sustainability issues have seeped into all forms of popular culture** — with environment-centric documentaries often going viral.

As access to educational material increases, so does awareness. **The knock-on effect?** Consumers are increasingly evaluating their purchasing behaviours. More interest is taken in company ethics, as well as how products are sourced, manufactured and packaged.

Despite this visible cultural trend, when it comes to period care — health and comfort still speaks volumes — especially for first-time buyers.

We found that consumers are often making the switch to sustainable options based solely on perceived health and comfort benefits, with sustainability simply acting as a **happy by-product**.

Are all tampons toxic? No one seems to have the answer

Despite a profusion of “non-toxic” menstrual products, little research has been conducted to determine whether tampons actually pose a health risk

★★★★★ TopKat · a year ago

Better for your body

After reading about all the 1000s of harmful chemicals in tampons and how tampons generally effect your body, as well as wanting to be kinder to the planet I started using reusables ie period pants and reusable pads but I found I just needed that extra bit of back up on heavy days. These are comfortable to wear and do the job and much better for your body and the environment



sophonaraap · 1 mo. ago

My menstrual cup changed my life! It is better for the environment, saves so much money over time, and somehow makes my cramps less painful! I have ADHD, so sometimes it can be difficult for me to remember to switch out, but cups you can leave in for longer. I always keep some tampons

Online, a growing community of people who menstruate are disregarding taboos and creating open forums of discussions to talk periods — from individual experience to new products. **At its core, the commentary is health-led.**

Themes range between **concerns over the toxicity and safety** of ‘normal’ sanitary products, to claims that **organic products can reduce period cramps** or that going plastic-free can reduce the risk of thrush, infection and allergies. Other consumers find eco-friendly materials to be **more breathable**. Or, **some just flat-out prefer the design and find the products more comfortable**.

THE HEALTH & COMFORT CONSCIOUS

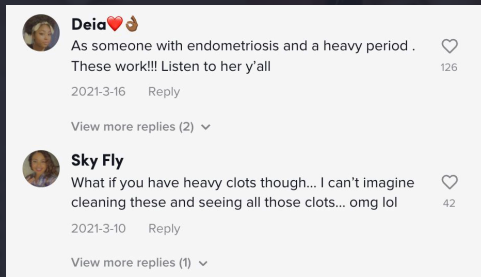
Persona Values: Comfort | Safety | Eco as an afterthought

Endometriosis

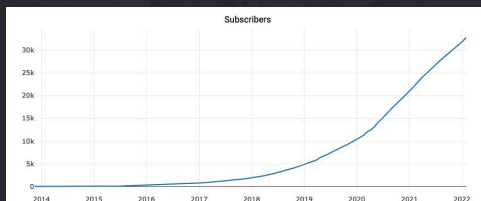
1 in 10 women of reproductive age in the **UK** suffer from **endometriosis**, and **176 million women** suffer worldwide.¹

Endometriosis is the condition where cells similar to the ones in the uterus are found elsewhere in the body, and these cells react to the menstrual cycle each month and also bleed. However, as there is nowhere for the blood to leave the body, this can cause chronic pain and fertility issues, where many women find it uncomfortable and painful to wear period cups or tampons.²

Period underwear has become an option that many women who suffer with this condition have turned to. It is a more **comfortable** alternative to tampons, and a more **sustainable** alternative to pads, especially when experiencing a longer period. Also, organic cotton period underwear can **limit the toxin load** as it reduces the exposure to plastics, and are designed to be more **breathable** — aiding comfort if bloating.³



32,832 Reddit subscribers to the endometriosis subreddit in 2022 — as the condition becomes more spoken about, more and more women are seeking support and advice about their experiences.



Menopause

As women transition through menopause, this stage of their lives can bring with it a different of severity of symptoms: from **hot flashes** and **night sweats** to **vaginal dryness and pain**, **mood changes** and recurrent **urinary tract infections**.

With over **19,800** subscribers to the **Menopause subreddit** page, where women are looking for guidance to their worries, the **menstrual cup** has become a solution for many. As the cup **'collects the menstrual fluid rather than absorbing it'** it will help to reduce vaginal dryness by not soaking up moisture.⁴ Also, **a major symptom of perimenopause is irregular or heavy periods** which can be controlled by products that are designed and cater for unexpected, heavier days.

¹ <https://pubmed.ncbi.nlm.nih.gov/19196878/>

² <https://www.endometriosisuk.org/index.php/endometriosis>

³ <https://theecoco.com/blog/endometriosis-and-the-roles-of-period-underwear/>

⁴ <https://www.mooncup.co.uk/blog/the-menopause-what-to-expect-and-how-to-help/>

ECO QUEENS

Persona Values: Reusable | Plastic-free | Biodegradable

We have seen that, for a lot of people, the sustainability benefits of using products such as menstrual cups and period underwear are a bonus addition to their primary reason for using them; these reasons include comfort, convenience, cost, etc. However, for a sizeable portion of people turning to eco-friendly products, it is this element that drives them to use such products in the first place.

While it is a slow learning curve for a majority of the population, **more and more people are understanding the massive environmental impacts of single use products more broadly, and single use period products specifically.**

As such, they are actively seeking out more sustainable alternatives. This is where not only the reusable items come in, but also more eco-friendly disposable products too, such as organic tampons and bamboo sanitary pads.

With single use plastic making headlines in recent years, the conversation has highlighted the issue of such plastic use in sanitary wear, such as tampon applicators. This has prompted many people to seek out more sustainable alternatives.

+49% increase in Google searches for 'ethically sourced' over the last 2 years

More than a third of British females are unaware of the impact single-use period products have on the environment



Not-so-fun facts about single-use period products

Typical menstrual pads contain up to 90% plastic

A box of pads contains as much plastic as 5 plastic bags

2 billion period products are flushed down British toilets each year

Menstrual products are the 5th most common products found on European beaches

Cleaner water as less plastic ends up in oceans

Single-use tampon applicators can take 500 years to break down

Disposal of single-use plastic period products generates 200,000 tonnes of waste per year

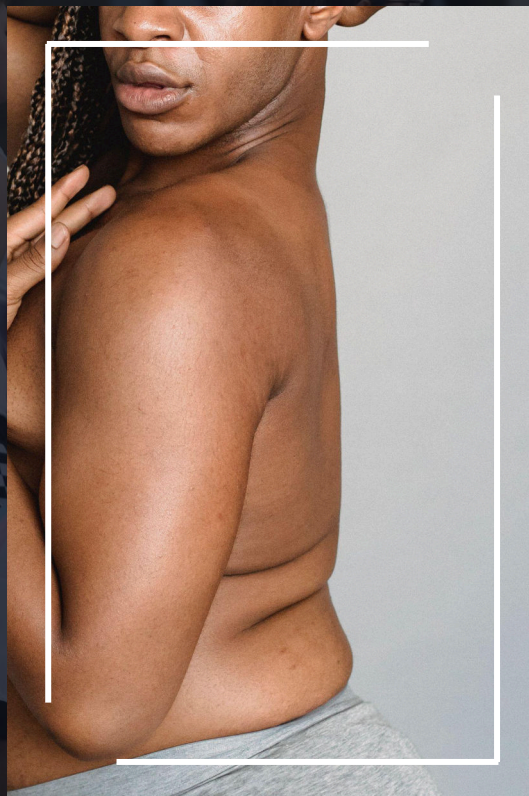
TRANS & NON-BINARY PEOPLE

Persona Values: Inclusive | Gender Neutral Style Options & Marketing

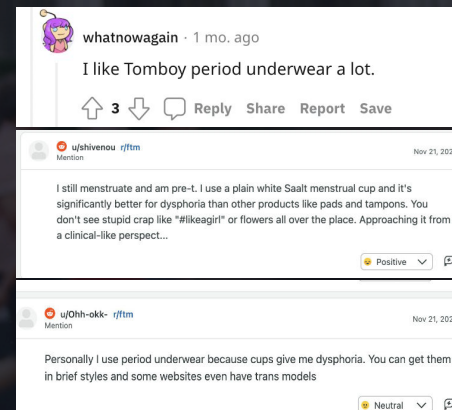
One key topic of conversation when it comes to sustainable period product options is their use among the trans and non-binary community. This is especially true for period underwear, with many companies producing various style options, including more gender-neutral and masculine options.

We've seen how this topic can be ripe for contention, sparking debate across social media but, if you can look beyond the vocal outliers, there is a hopeful move by many companies to embrace the trans and non-binary community through making inclusive products and catering to their unique needs.

When it comes to period products, many trans and non-binary people are met with packaging and language that negatively impacts their feelings of gender dysphoria. For those companies embracing this community and creating products and spaces for this community to feel seen, they can have a genuine positive impact, even creating moments of gender euphoria for individuals in this group.



On forums such as Reddit, the trans and non-binary community are actively seeking period products that work for them, and **the most recommended product is period underwear**. Conversation on these types of forums is open given the anonymous nature of posts, giving a true insight into people's preferences & concerns:



FIRST TIMERS

Persona Values: Comfort | Security | Accessible Information

One key theme that comes up time and again is how period underwear is particularly effective for those young teens at the start of the period journey. Let's say your child has recently started their period and is not yet confident managing this. They're invited to a sleepover and feel reluctant to go as a result of this new development. A suggestion put forward by many people online is that period underwear is not only an effective method for managing your period, but that it is also discreet, looking no different to normal underwear. This way, your child can feel confident and not have to disclose anything they are not yet comfortable with to their friends.



We are seeing a rise in content aimed at young people looking for information about starting their periods, and what products are best to use. More than any generation previously, this young generation are already more eco-focused than generations before, naturally, they want to explore products that align with their values. And they are doing the research. They are turning to online content, social media, and forums to ask questions and get answers, including Reddit, TikTok, Pinterest, and YouTube.

Sustainable products for your first period



Best periods products to use for a first period

By Cath Hakanson

Inside: An extensive guide to the different types of period or menstruation products your child can use for their first period. You'll learn about the different types of products, how they work and why you may (or may not) want to use them. Plus how to find free samples and books about periods!

Pads, tampons, liners, period cups, sea sponges... the list goes on!



yae my beloved <3

buy when begin period

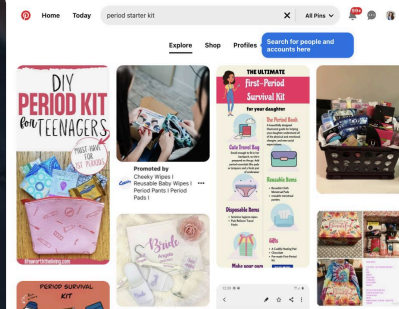
2021-5-26 Reply



Your local weirdo

I have not started my period yet but when I do I will be getting myself one of these ANYTHING FOR MO LEAKS

11-17 Reply



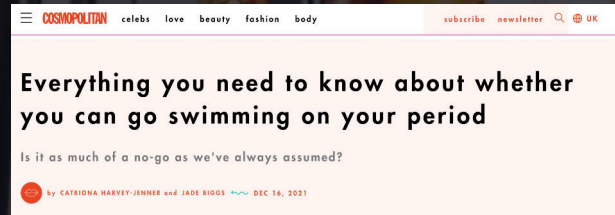
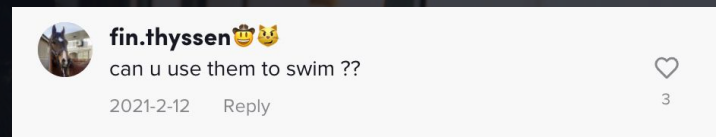
THE SPORTS STARS

Persona Values: Effective | Adaptable | Reliable | Sweat-Proof

Another area we have seen discussed when it comes to menstrual products for comfort and convenience is sports. Whether it's the average person looking for gym wear they feel comfortable in on their period, or dedicated sportspeople looking for something they can wear on race day, this is a key topic.

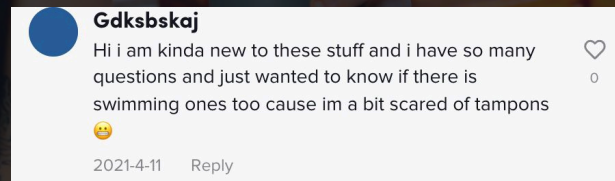
As a result, there has been a real boost in clothing options within the period product space; this includes absorbent swimwear you can wear on your period and gym shorts that are used in a very similar way to period underwear. The boom in this industry has opened the door for product niches we haven't really seen before now.

Beyond the clothing options, people are exploring products such as menstrual cups and discs which many claim can barely be felt while doing such activities, unlike the inconvenience of disposable pads and tampons.



+51.2%

Increase in 'period leggings' searches in 2021 compared to 2018. Searches saw a huge spike in April 2021 which aligned with the reopening of gyms.



THE ECONOMICALLY INCLINED

Persona Values: Cost-centric | Accessible | Reusable

The cost of period products has been a hot topic in the UK ever since the Tampon Tax was abolished in December 2020. A tax that classed period products as 'luxury items'.

Since then, conversations around the burden of period products for women, in particular lower-income families, have gained momentum in the media and social spaces. **The resulting scenario has been coined 'period poverty'.**

The debate surrounds **two key groups:**

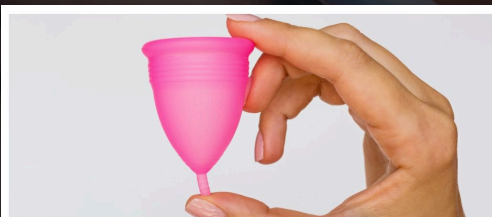
1) the burden of the cost of period care on the average person who menstruates

2) the lack of accessible period products for those in poverty

In January 2020, the government stepped up by launching a free period product scheme for all young people in English state schools and 16-19 organisations.

Uptake statistics paint a positive picture, with **94% of secondary schools now providing free period products to students.**

The number of environmentally friendly or reusable products ordered increased too, by 18% from 2020 to 2021. Now sitting at almost half of all products ordered.



Can menstrual cups help fight period poverty?

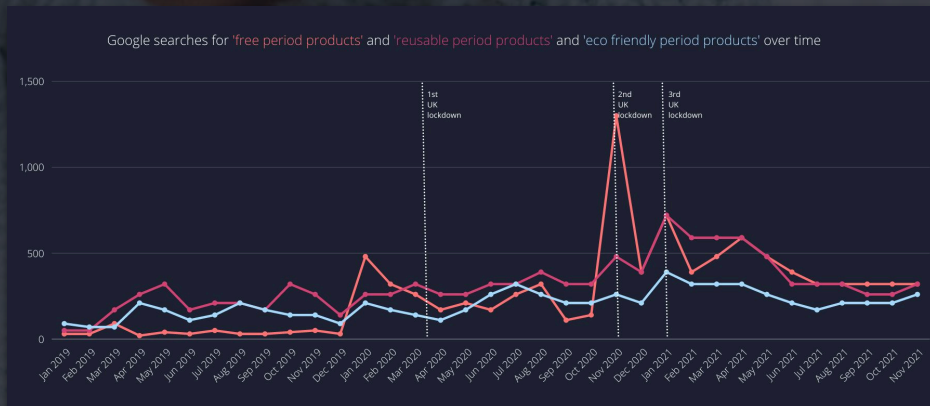
Period poverty arose as people struggle to access period products due to financial constraints, and it affects the daily lives of millions of menstruators around the world. 1 in 10 people who menstruate across the country can't afford to buy menstrual products.

A possible breakthrough?

Reusable products have been identified as a possible solution to period poverty. Considered a more economically viable option; a single menstrual cup can last up to 10 years.

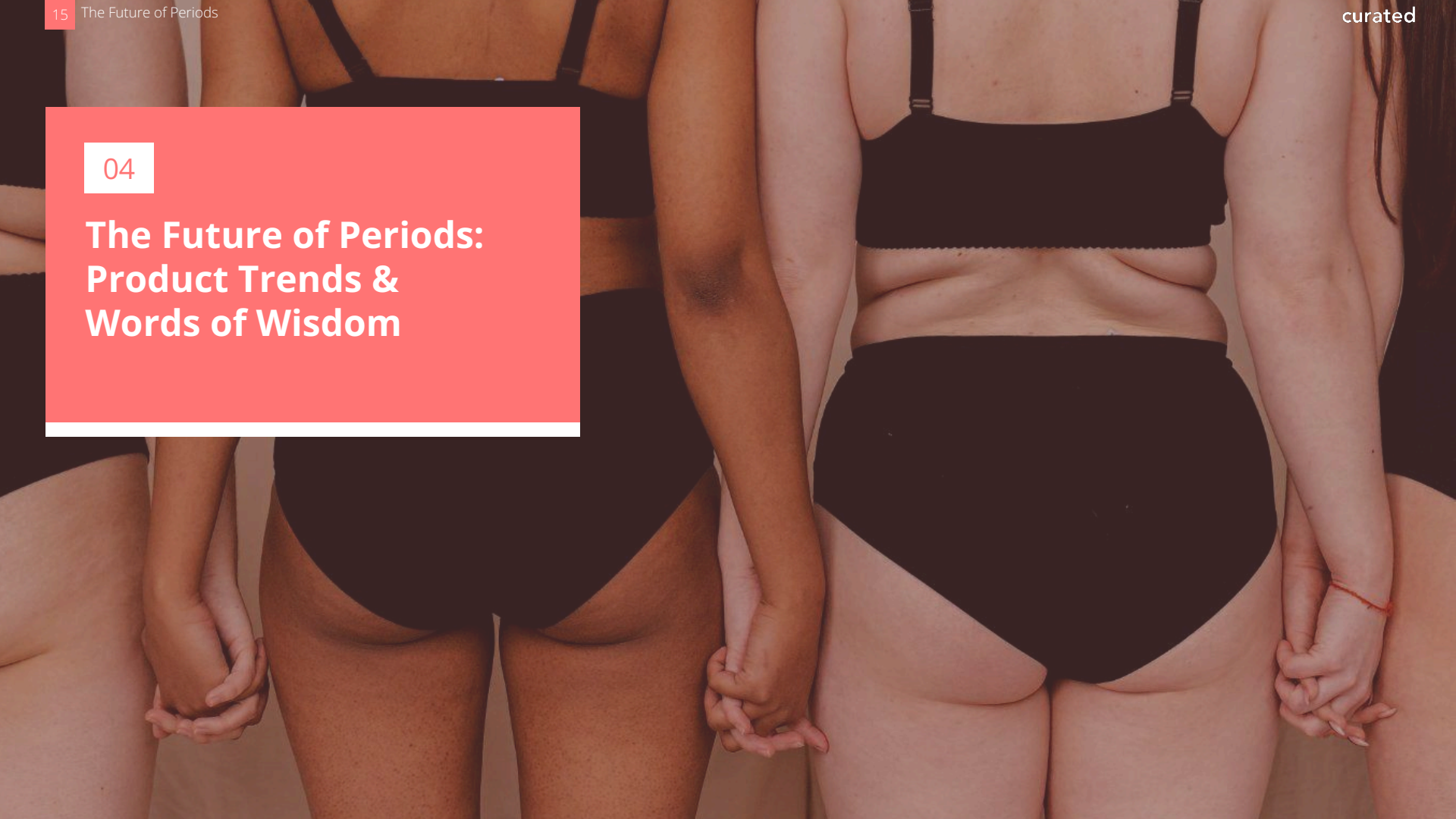
Charities and even household retailers are making noise in the space too. Donating, manufacturing, and creating schemes.

But there are still tangible progress blockers. Period pants, for example, are still classified by the UK Treasury as 'underwear' so are excluded from the tax exemption, making an otherwise environmentally and cost-friendly product just out of reach for a number of people.



04

The Future of Periods: Product Trends & Words of Wisdom



PRODUCT TRENDS: CBD INTEGRATED PERIOD PRODUCTS

The global CBD industry is poised to grow by \$29.91 billion during 2021-2025, this is at **a compound annual growth rate of 26.93%**.

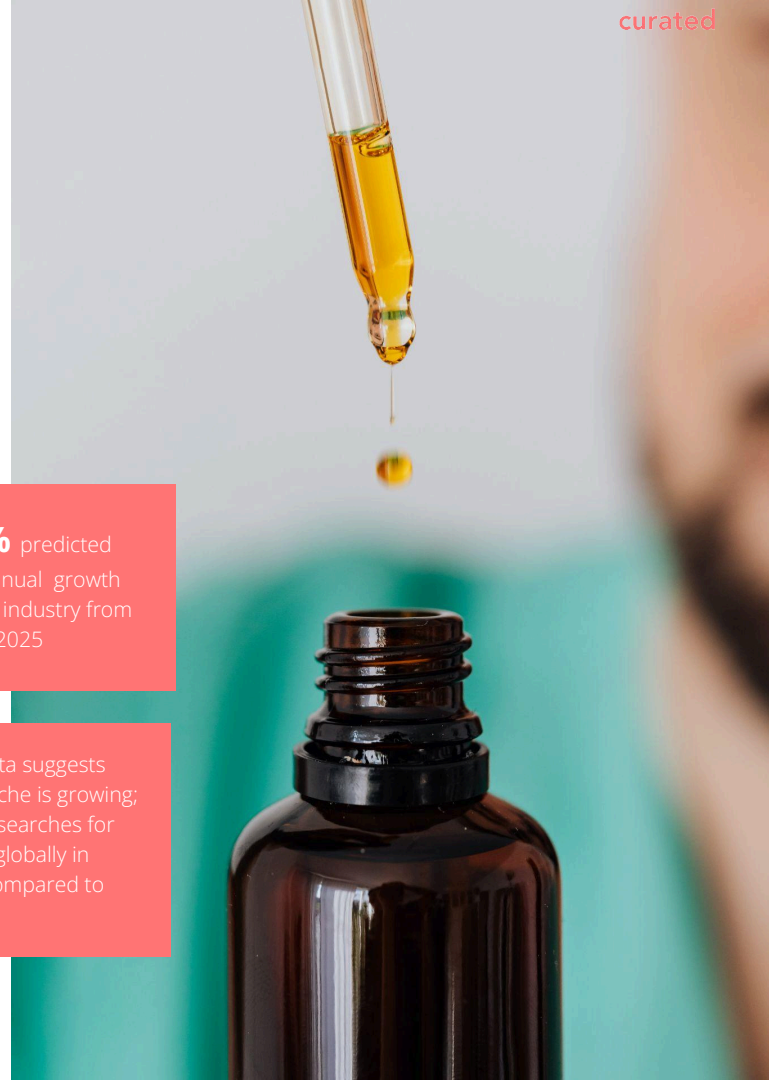
The rise in CBD infused menstruation products is a microcosm of the CBD industry booming in recent years. Brands selling menstruation products utilising CBD can be looked at as tapping into this growth in products where its benefits and popularity can be harnessed.

How does a period product brand leverage CBD to be a source of competitive advantage?

- **Thorough research:** must be science backed and emphasise R&D within operations and an extensive medical advisory board. These are the sorts of factors that can lead to successful launch.
- **Educate consumers:** The company must have multiple experts in the healthcare field that provide users with the confidence that the products they purchase are safe and beneficial.
- **Agility:** The brand must not rely solely on CBD infusion as a selling point, it should emphasise other product features such as sustainability in terms of biodegradable packaging as well as fair labour practices in tandem.

+26.93% predicted
compound annual growth
rate of the CBD industry from
2021-2025

Global search data suggests
interest in this niche is growing;
with 4x as many searches for
'CBD tampons' globally in
October 2021, compared to
2018.



WHAT DOES THE FUTURE LOOK LIKE?

1. Sustainable as the natural first-choice

As women, girls, and people who menstruate become more aware of the issues surrounding single-use period products, attitudes will continue to shift towards more sustainable options. This is particularly visible in Gen Z — a study revealed that the younger generation are championing the move to reusable sanitary products, as almost 70% of Gen Z have a strong awareness of reusable sanitary products.

2. Landfill-free and squeaky clean

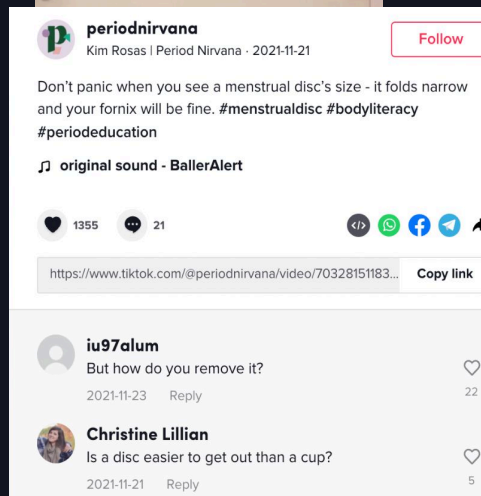
The performance of existing sustainable products including menstrual cups, organic tampons and pads, and period pants, suggests there is room for more eco-friendly products in the future. With these reusable solutions gaining traction, we will see the emergence of new products, including menstrual disks and menstrual cup steamers and sterilisers.

3. Transparency will triumph

Advances will continue to be built as sustainable period products become more mainstream. One day we may reach a stage where consumers reject plastic and synthetic period products, as the market becomes more transparent about what goes into products and the impact this has on personal hygiene and the environment.

4. The future is fluid

Gender neutral marketing and product options are expected to grow as the worldview of gender continues to shift and become less binary.



PLAN FOR PEOPLE, THE PLANET WILL FOLLOW

Sustainable
Period Care
Report
2022

"Sustainability has long been a concern across all industries, but the boom in sustainable period care has been accelerated by the pandemic. Not only are generations of people beginning to understand the huge environmental impact mainstream period products have on the environment, but we have found ourselves at a unprecedented period of time (pun intended; overuse of the world 'unprecedented' not intended) where people feel more free to explore the variety of sustainable options open to them. Through a forced need to stay at home, a door has been opened for people to try products they may have been too nervous — or simply set in their ways — to try.

Specialist brands in this space, as well as wider ecommerce brands need to take note, and adapt, to this growing customer demand. It is only going to get bigger as our climate crisis and customer awareness of their expanding options grow in tandem. The time to diversify is now."



Danielle Smith
Lifestyle Channel Lead - Curated

"While a move towards sustainability is essential for our planet, remember that personal convenience and experience are just as important for driving demand. Trust me when I say that nobody will use a product that makes their period more of a hassle. The way to embed eco-friendly practices into most hearts is to offer sustainable solutions that fit your customers' lifestyle. First understand the nuanced factors that may drive a person to seek alternative period care options — economics, functionality, comfort, gender identity — and then offer a solution that benefits both person and planet. If brands can do this, then they're a step closer to a better world."



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Sources of Truth:

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