

Personal Lubricants Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 118 pages | Mordor Intelligence

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Report description:

The personal lubricants (lube) market is anticipated to register a CAGR of 8.6% during the forecast period.

The COVID-19 pandemic impacted the personal lubricants market. The lockdown measures taken by the government to avoid the spread of the virus reduced the manufacturing capacity of the companies, which impacted the demand for sexual health wellness products. However, resuming manufacturing activities post-pandemic and increased sexual health awareness among the population to use personal lubricants is expected to increase the demand for personal lubricants, fueling the market's growth.

The rise in the geriatric women population, increased life expectancy, early product launches in developed economies, and the growing prevalence of vaginal dryness and erectile dysfunction are expected to drive the market's growth.

The increasing prevalence of vaginal dryness, along with the rising elderly women population, is expected to drive the market's growth. For instance, a study published in IJRCOG in February 2021 stated that the prevalence of menopausal symptoms among women in Northern India was vaginal dryness (80%), followed by vaginal itching (76%). The aging and menopause stage in females reduces the estrogen level, which helps maintain vaginal lubrication, and increases the chances of developing vaginal dryness. Thus, the high number of vaginal dryness cases among women is expected to increase the demand for water-based lubricants such as Astroglide, eros aqua, and others, thereby propelling the demand for personal lubricants.

The prevalence of erectile dysfunction in men increases with age, as aging is frequently accompanied by several biological disorders, such as cardiovascular disease, diabetes mellitus, hyperlipidemia, and hypertension, that can impair erectile function. For instance, a cross-sectional study conducted from April 10 to May 20, 2021, published in the International Journal of Hypertension in November 2021, showed that men living with hypertension in Kenya had the highest prevalence of erectile

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dysfunction (94.5%), followed by Spain (71%), Israel (67%), Qatar (66.2%), Thailand (56.2%), Nigeria (65.8%), and Bangladesh (61.3%).

According to the same source, the prevalence of ED in Thailand was 56.2%, followed by Cameroon at 50.6%, Egypt at 43.2%, and Greece at 35.2%. Thus, the high burden of ED among the population suffering from hypertension is anticipated to increase the demand for gels or creams that helps increase the production of the testosterone hormone and improves penis functionality, thereby propelling the demand for personal lubricants.

An article published in the JFMPC in March 2021 observed that the prevalence of ED in men aged between 25-70 years was 19% and in men aged 50 years or above was 25%. As per the same source, 322 million men are expected to suffer from erectile dysfunction worldwide and 200 million in Asia in 2025. Thus, the expected increase in the number of people suffering from ED is anticipated to increase the opportunities for companies to manufacture effective gels, creams, and lubricants for treating ED, which is expected to augment the market's growth over the forecast period.

However, the lack of awareness and proper care among elderly patients and the high cost of products in emerging economies are expected to hinder the market's growth over the forecast period.

Personal Lubricants Market Trends

Water-based Lubricants Segment is Expected to Hold the Major Market Share in the Forecast Period

The water-based lubricant segment is expected to dominate the industry over the forecast period. The factors attributing to the market's growth are the increasing adoption of water-based lubricant products due to their proven efficiency in lubrication, higher compatibility with latex condoms, sex toys, and gel-like consistency. These lubricants are similar to natural vaginal lubricants, making them easy to clean and available at a lower cost than other types.

The increased availability of a wide range of these marketed products with fewer side effects and the introduction of premium products by manufacturers, such as flavored and moisturizing lubricants, in recent years, is expected to fuel the segment's growth over the forecast period. For instance, in January 2021, O-Shot Women launched O-Shot Liquid Glide for women, a water-based lubricant under its sexual segment. This new formula is developed to mimic the body's natural lubrication. It is made with Aloe Vera, Lactic Acid, and HempClear extract, which combine to boost natural moisture and long-lasting comfort.

The preservative-free and natural products are increasingly in demand due to growing consumer awareness of these products and rising adult women's concerns about vaginal dryness and sexual dysfunction. Many water-based personal lubricants and lubes are also available in the market that contains glycerin that reduces friction during intercourse. Some examples are KY Jelly Personal Lubricating gel, Durex Play Tingling Cooling Lubricant, Kamasutra Strawberry Lubes, Kamasutra Aloe and Vitamin E Lubes, and others.

Therefore, the above-mentioned factors are expected to boost the segment's growth over the forecast period.

North America Dominates the Market and it is Expected to Grow during the Forecast Period

North America is expected to dominate the overall personal lubricants market during the forecast period. The factors attributing to the growth of the market are the increasing prevalence of erectile dysfunction and vaginal dryness due to sedentary lifestyles and increased stress among the population and the increasing adoption of personal lubricants by men who have sex with men (MSM) and sex workers to reduce discomfort during intercourse.

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The United States witnessed the highest number of positive COVID-19 cases and witnessed a significant impact on the lubricant demand. However, the impact of COVID-19 is not much significant in other countries of North America, i.e., Canada and Mexico, due to the comparatively fewer positive cases and functioning of end-user industries. The lubricant market in the United States witnessed a downward trend in 2020 as the country was completely locked down, and very few industries for essential services were functioning. End-user industries such as transportation and chemical are the most affected industries by the lubricants industry in the region. A rapid increase in the number of older adults and the rising adoption of these products in the region are the factors expected to fuel the demand for personal lubricants.

Lubricant manufacturers are focused on creating awareness regarding the management of vaginal dryness that can lead to abrasions and chafing of the skin and rising susceptibility to sexually transmitted diseases. Product innovations by manufacturers to meet the increasing customer demand are expected to propel the market's growth. For instance, in May 2022, BioFilm launched the latest addition to its line of personal lubricants, such as ASTROGLIDE X Spray 'n Glide Premium Silicone Personal Lubricant. This spray lube can be applied one-handed and features a gentle spray feel and an enjoyable cooling sensation for elevated pleasure.

Therefore, due to the above-mentioned factors, North America is expected to have a significant market share in the market studied over the forecast period.

Personal Lubricants Market Competitor Analysis

The personal lubricants market is moderately competitive and consists of several major players. Few prominent players dominate the market and apply various strategies, like extensive branding and partnerships with e-commerce stores. Other manufacturers are launching a new range of premium products adding flavors and nutritional values to enhance the ease and comfort of sexual activity to consolidate their market positions. Some companies dominating the market are Durex Inc., BioFilm Inc., Church & Dwight Co. Inc., LifeStyles Healthcare Pte Ltd, and Reckitt Benckiser Group PLC.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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