

## **Condom Market - Global Outlook & Forecast 2023-2028**

Market Report | 2023-08-08 | 681 pages | Arizton Advisory & Intelligence

### **AVAILABLE LICENSES:**

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### **Report description:**

The global condom market is expected to grow at a CAGR of 8.85% from 2022 to 2028.

### **KEY INSIGHTS**

- It has been estimated that every year, over one million people are infected with STIs and 300 million with HPV. A huge proportion of unaware people still exist, and unmet needs for condoms.
- The most important and immediate need for condoms exists among women and girls. Female condoms account for less share of the global condom market, and there is a huge opportunity for growth in the global female condom market. Vendors who can increase their ability to reach the female population are expected to enjoy a competitive advantage in the market.
- Demographical factors, such as age, population, GDP, disposable income, and others, play a significant role in the condom market. Developed regions, such as North America and Europe, has significant penetration of condom usage owing to better education and high income.
- A huge proportion of India still lives in rural areas, and sex is taboo. As a result, a large part of the population is still untapped, reflecting huge growth potential.

### **MARKET TRENDS & OPPORTUNITIES**

#### **Innovative Condom Designs**

Condoms are used for birth control and protecting users from sexually transmitted diseases (STDs). However, post-sex contraceptive solutions such as pills and surgical procedures to prevent pregnancies are relatively more harmful than condoms. This has led many firms to research, innovate & develop a variety of condoms in the condom market. The technology-driven condoms are some of the new & innovative contraceptives that people highly prefer. As many end-users are allergic to latex, they highly prefer to use these latex-free condoms, thereby motivating various companies to manufacture and produce latex-free condoms. The technology-based condoms are usually light & slim that are available in different colors, sizes, & scents as per the

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consumer needs. Some of these condoms include ORIGAMI, Hydrogel, and The Galactic Cap.

## Sex Education Programs Driving Awareness

Teenage sex can potentially result in unintended pregnancies and transmission of STIs and STDs. Birth control and post-conception contraceptives have increased significantly to prevent unwanted pregnancies and control the teenage pregnancy rate. Moreover, sex education is a major factor driving the use of contraceptives, including condoms. Several countries worldwide offer teenage sex education programs to make teenagers aware of their bodies, reproduction, STDs, and safe sexual intercourse.

Sex education among teenagers in different countries:

- Egyptian schools have sex education programs for students in the age group of 12 to 14 years. They provide teenagers with comprehensive knowledge of human reproductive systems, contraceptives, and STDs.

## INDUSTRY RESTRAINTS

### Availability of Several Substitutes

Although condoms rank a bit low on the perfection rate, they provide a high protection rate against STDs and STIs. However, the risk of STD and STI transfer rate is lower or non-existent in people who stick to a single partner. In such scenarios, people prefer using long-term contraceptives since condoms must be used every time one has intercourse. Other contraceptives are usually replaced at longer intervals or, in some cases, permanently. Surgical procedures such as vasectomy and tubal ligation are permanent and non-reversible. Implants or IUDs have a long lifetime of 3 to 12 years, depending on the type of implant, and are mostly reversible. Some hormonal injections also can provide 1-12 months of protection. With such a broad range of options, people may also seek long-standing implants that can protect against pregnancies for a longer duration.

## SEGMENTATION INSIGHTS

### INSIGHTS BY PRODUCT

The global condom market is characterized by high demand for male and female condoms. In 2022, the male condom segment dominated the market. Factors like male condoms are the cheapest contraceptive measures in the market with high availability, wearability, & disposability and are easy to purchase, contributing to the segment growth. Despite being in the nascent stage of adoption, there has been a rise in the number of innovative female condom products in the market. A special type of female condom called an anti-rape condom is designed to protect women against forced sex. They are designed to cause pain to the attacker and cause the attacker's penis to bleed. Anti-rape condoms are equipped with spikes on the inside and must be pre-inserted into the vagina and retained during incidents of potential assaults.

### Segmentation by Product Type

- Male Condom
- Female Condom

### INSIGHT BY MATERIAL

The global condom market is categorized into latex and non-latex segments based on the materials used. Consumers highly drive the male condom due to its ease of availability, low costs, and highly preferred among couples compared to female condoms. Moreover, the rise of non-latex condom offerings is driven by the need for non-allergic contraceptives that offer better overall performance than latex ones. Non-latex condoms, usually made of polyurethane, polyisoprene, or nitrile rubber, are thinner than

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latex condoms and provide better sexual pleasure and sensitivity.

#### Segmentation by Material Type

- Latex Condom
- Non-Latex Condom
  - o□ Polyurethane
  - o□ Polyisoprene
  - o□ Nitrile
  - o□ Lambskin

#### INSIGHT BY END-USER

The global condom market by end-user is bifurcated into branded and institutional condoms. In 2022, the institutional condoms segment dominated the market regarding unit shipments. This is mostly because the government in regions such as the Middle East & Africa, and North America are concerned about reducing the prevalence of HIV. Millions of condoms are distributed and made available to consumers, especially sex workers in such regions. Branded condoms cost more than institutional condoms since they are procured from various distribution channels.

#### Segmentation by End-user

- Branded Condom
- Institutional Condom

#### INSIGHT BY DISTRIBUTION CHANNEL

Condoms are mainly sold through retail distribution channels such as specialty stores, supermarkets, hypermarkets, mass-market players, drug stores or pharmacies, and grocery stores. While institutional condoms are sourced or procured directly through manufacturers via tenders, branded condoms are sold via several distribution channels.

#### Segmentation by Distribution Channel

- Offline
  - o□ Specialty Stores
  - o□ Mass-Market Players
  - o□ Drug Stores/Pharmacies
  - o□ Grocery Stores
- Online

#### GEOGRAPHICAL ANALYSIS

APAC held the most substantial global condom market share in 2022, accounting for over 37% in revenue. The region includes the world's most populous countries, China and India. Although people in the regions are not completely aware of sexual health and condom use, it accounts for the highest share of the global condom market due to a huge consumer base. The high penetration of condoms in countries such as Japan and China helped APAC contribute significantly to both value and volume of the global market. However, there is a low penetration of condoms and sexual wellness products in countries such as India and Bangladesh.

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## Segmentation by Geography

- APAC
  - o China
  - o Japan
  - o India
  - o Australia
  - o South Korea
  - o Indonesia
  - o Malaysia
  - o Singapore
  - o New Zealand
  - o Thailand
  - o Philippines
  - o Vietnam
  - o Sri Lanka
  - o Rest of APAC
- North America
  - o The U.S.
  - o Canada
- Europe
  - o The U.K.
  - o Germany
  - o Italy
  - o France
  - o Spain
  - o Netherlands
  - o Poland
  - o Sweden
  - o Denmark
  - o Norway
  - o Rest of Europe
- Middle East & Africa
  - o UAE
  - o Kenya
  - o Saudi Arabia
  - o Nigeria
  - o South Africa
  - o Algeria
  - o Ethiopia
- Latin America
  - o Brazil
  - o Mexico
  - o Argentina
  - o Colombia
  - o Peru
  - o Chile

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## COMPETITIVE LANDSCAPE

The global condom market is highly fragmented, with several top vendors. However, the industry is expected to consolidate in the coming years slowly. The present scenario forces vendors to redefine their unique value proposition to achieve a strong industry presence. Some prominent players in the global condom market include LifeStyles, Church & Dwight, Reckitt Benckiser Group, Okamoto Industries, and Karex Berhad. These companies have a global presence in at least three major regions: North America, APAC, and Europe. However, local vendors provide products with similar specifications at lower prices. Such instances have intensified price wars among vendors, and the market has the threat of infiltration with low-quality products. The major vendors continually compete for the leading position in the industry, with occasional competition coming from other local vendors.

### Key Company Profiles

- [ ] Reckitt Benckiser Group
- [ ] Okamoto Industries
- [ ] LifeStyles Healthcare Pte. Ltd.
- [ ] Karex Berhad
- [ ] Church & Dwight

### Other Prominent Vendors

- [ ] BILLY BOY (MAPA)
- [ ] LTC Healthcare
- [ ] Caution Wear
- [ ] Convex Latex
- [ ] Cupid Limited
- [ ] Dongkuk Techno
- [ ] Double One
- [ ] Fujii Latex
- [ ] HBM Group
- [ ] HLL Lifecare Limited
- [ ] GLYDE
- [ ] Innolates Limited
- [ ] Kamyra Condoms
- [ ] Japan Long-Tie (China)
- [ ] LELO
- [ ] Mankind Pharma
- [ ] Mayer Laboratories
- [ ] Mister Size
- [ ] Nulutex Sdn. Bhd.
- [ ] Ritex
- [ ] Sagami Rubber Industries
- [ ] Shandong Ming Yuan Latex Co.
- [ ] Skins Sexual Health
- [ ] Silk Parasol
- [ ] StaySafe Condoms (AdvaCare Pharma)
- [ ] Unique Condoms International

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- Thai Nippon Rubber Industry
- R&S Consumer Goods GmbH
- Hello Cake
- Veru (The Female Health Company)
- Sustain Natural

#### KEY QUESTIONS ANSWERED:

1. How big is the condom market?
2. What is the growth rate of the global condom market?
3. What are the growing trends in the condom market?
4. Which region holds the most significant global condom market share?
5. Who are the key players in the global condom market?

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28.7.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.7.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.7.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.8 INDIA  
28.8.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.8.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.8.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.9 AUSTRALIA  
28.9.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.9.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.9.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.10 SOUTH KOREA  
28.10.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.10.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.10.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.11 INDONESIA  
28.11.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.11.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.11.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.12 MALAYSIA  
28.12.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.12.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.12.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.13 NEW ZEALAND  
28.13.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.13.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.13.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.14 THAILAND  
28.14.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.14.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.14.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.15 PHILIPPINES  
28.15.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.15.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.15.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.16 VIETNAM  
28.16.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

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28.16.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.16.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.17 SRI LANKA  
28.17.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.17.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.17.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.18 REST OF APAC  
28.18.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.18.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.18.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.19 NORTH AMERICA  
28.19.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.19.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.19.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.20 US  
28.20.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.20.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.20.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.21 CANADA  
28.21.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.21.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.21.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.22 EUROPE  
28.22.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.22.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.22.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.23 UK  
28.23.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.23.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.23.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.24 GERMANY  
28.24.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.24.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.24.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.25 ITALY  
28.25.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.25.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.25.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.26 FRANCE  
28.26.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.26.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.26.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.27 SPAIN  
28.27.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.27.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.27.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.28 NETHERLANDS

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28.28.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.28.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.28.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.29 POLAND  
28.29.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.29.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.29.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.30 SWEDEN  
28.30.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.30.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.30.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.31 DENMARK  
28.31.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.31.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.31.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.32 NORWAY  
28.32.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.32.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.32.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.33 REST OF EUROPE  
28.33.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.33.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.33.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.34 MIDDLE EAST & AFRICA  
28.34.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.34.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.34.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.35 UAE  
28.35.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.35.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.35.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.36 KENYA  
28.36.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.36.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.36.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.37 SAUDI ARABIA  
28.37.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.37.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.37.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.38 NIGERIA  
28.38.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.38.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.38.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.39 SOUTH AFRICA  
28.39.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.39.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME  
28.39.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

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## 28.40 ALGERIA

28.40.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.40.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.40.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.41 ETHIOPIA

28.41.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.41.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.41.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.42 LATIN AMERICA

28.42.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.42.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.42.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.43 BRAZIL

28.43.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.43.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.43.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.44 MEXICO

28.44.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.44.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.44.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.45 ARGENTINA

28.45.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.45.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.45.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.46 COLOMBIA

28.46.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.46.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.46.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.47 PERU

28.47.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.47.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.47.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 28.48 CHILE

28.48.1 PRODUCT: MARKET SIZE & FORECAST: VALUE & VOLUME

28.48.2 MATERIAL: MARKET SIZE & FORECAST: VALUE & VOLUME

28.48.3 END-USER: MARKET SIZE & FORECAST: VALUE & VOLUME

## 29 APPENDIX

### 29.1 ABBREVIATIONS

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