

## **Sexual Wellness Market - Global Outlook & Forecast 2024-2029**

Market Report | 2024-12-10 | 783 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global sexual wellness market is expected to grow at a CAGR of 7.53% from 2023 to 2029.

### **MARKET TRENDS & OPPORTUNITIES**

#### **Growing Penetration of Digital Marketplace**

One of the key growth opportunities for vendors in the global sexual wellness market is through digital sales strategies. Online channels are the most preferred modes of purchase for customers in the market. For instance, over 25% of the sexual wellness products sold in the U.S. are via online channels, with Amazon.com being the most preferred website for customers among all other websites offering such products. This trend is growing quickly in the U.S. and other countries worldwide. The high rates of internet penetration, the availability of smartphones and laptops, and the presence of numerous online platforms for customers have dramatically increased the demand for sexual wellness products.

#### **Rising Use of Dating Applications**

Global dating applications like Tinder, Bumble, and Badoo have significantly influenced the sexual wellness market by fostering a culture of casual hookups and accessible dating. This shift has increased the demand for sexual wellness products such as condoms, lubricants, and sex toys. Tinder's swipe-based interface simplified online dating, making casual relationships more common. Bumble's woman-first approach and focus on meaningful connections have also changed dating dynamics, encouraging safe and consensual interactions. Moreover, the innovative approaches of apps like YouApp and DayOne significantly impact the high penetration of dating applications in the APAC region, where the online dating market is rapidly growing.

### **INDUSTRY RESTRAINTS**

#### **Easy Availability of Substitutes for Condoms**

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While no contraceptive can be termed foolproof to prevent pregnancy, several of them have come closer to achieving perfection. Contraceptives, including surgical procedures, pills, barriers, and implants, are designed and upgraded regularly to achieve perfection. Surgical procedures and implants usually have a low failure rate on correct implementation. They typically come with a 0.1-0.6% failure rate when perfectly done. Other contraceptives function by inducing hormonal changes, which are mostly achieved via injections, pills, or implants. These hormonal contraceptives have perfect use, and the failure rate ranges between 0.05% to 1.1% based on type. Condoms rank a bit lower on the scale and have a higher failure rate when compared with several other suitable birth control measures. However, although condoms rank a bit low on the perfection rate, they provide a high rate of protection 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 have to be used every time one has intercourse. Apart from condoms, other contraceptive methods work more efficiently & effectively in the market. Some of these include combined oral contraceptives, The Mini-Pill, Caps/Diaphragms, Fertility Awareness Apps & Devices, Female Condoms, Depo Shots, Nexplanon Implant, Copper IUD/Coil, Mirena IUS, Jaydess, Sponges, The Patch, Vasectomy, and others.

## SEGMENTATION INSIGHTS

### INSIGHT BY PRODUCT

The global sexual wellness market by product is segmented into sex toys, condoms, exotic lingerie, sexual lubricants, and others. The sex toys segment holds the most significant global market share in 2023. Vibrators or dildos, massagers, rubber penis, real dolls, sexual games, and bondage gear are the prominent sex toys available in the market. Historically, men were the primary customers of sex toys worldwide. Recently, the market has witnessed a shift in this trend as women are becoming more sexually empowered globally. There is also a growing demand for both shared and solo sex toys among end users. Sex toy manufacturers and retailers are capitalizing on this growing interest by offering bundled products and "starter kits" for inquisitive customers. All these factors contributed to the growth of sex toys in the market.

Further, condoms are crucial products for a healthy sexual life. They are also one of the primary contraceptive products that are widely used and have observed a growth in demand in recent times owing to factors such as the rise in global population, awareness of sexually infectious diseases, and focus on safe sex communicated through sex education platforms. Condom vendors are responding to growing demand by offering a variety of sizes, shapes, thicknesses, flavors, and packaging options. The perception of condoms has evolved from being seen as taboo to being viewed as a key component of wellness. Despite this, the growth rate of the condom segment has slowed, partly due to declining fertility rates. However, the importance of sexual protection measures, especially in preventing STDs and STIs, remains high, which sustains the demand for condoms.

#### Segmentation by Product

- Sex Toys
- Condoms
- Exotic Lingerie
- Sexual Lubricants
- Others

#### Segmentation by Sex Toys

- Vibrators
- Rubber Pennies
- Cock Rings
- Anal Beads
- Rubber Vaginas
- Blindfolds/Feathers
- Harness/Strap-on-Penises

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- Bondage Gear

Segmentation by Condoms

- Gender

- Material

- End-users

- Distribution Channel

Segmentation of Condoms by Gender

- Male

- Female

Segmentation of Condoms by Material

- Latex

- Non-latex

- Polyurethane

- Polyisoprene

- Nitrile

- Lambskin

Segmentation of Condoms by End-users

- Branded

- Institutional

Segmentation of Condoms by Distribution Channel

- Offline

- Online

Segmentation by Exotic Lingerie

Segmentation by Sexual Lubricants

- Water-based

- Silicon-based

- Oil-based

- Hybrid

Segmentation by Others

## INSIGHT BY GENDER

The global sexual wellness market is segmented by gender, with the male segment holding the largest revenue share in 2023, followed by the female segment. Recognizing that men and women have distinct needs and preferences, the industry prioritizes targeted marketing for products suited to each gender. Many products developed in the sexual wellness market, either condoms or sexual lubricants, have focused on the demands of men as their primary customers. For vendors, male customers are expected to offer better opportunities to develop and manufacture products for the sexual wellness market. Lubricants are common wellness products preferred by men due to their erectile dysfunction, thus creating high opportunities for vendors to focus on these product portfolios. Apart from these, condoms and sex toys also have a high demand among male customers in the market. Furthermore, the market for female-oriented sexual wellness products is projected to grow at a CAGR of over 8%. Over the last couple of years, several start-ups have come up with the concept of catering to women, unlike others, who focus more on men and their needs. Start-ups such as Nuelle, B-wom, Damivia, and Sustain (currently Combe owns a majority stake in Sustain) have evolved significantly, thereby contributing to the growth of the sexual wellness market for females.

Segmentation by Gender

- Male

- Female

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## INSIGHT BY DISTRIBUTION CHANNEL

In terms of distribution channels, the global sexual wellness market is segmented into offline and online segments. These products are primarily sold through retail outlets such as specialty stores, supermarkets, hypermarkets, mass-market retailers, drugstores, and grocery stores. They are also available online through OEMs, e-commerce platforms, and direct-to-consumer websites like Amazon, Adam & Eve, eBay, Ann Summers, Alibaba, and AliExpress. In 2023, the offline segment held the most prominent segmental share. Pharmacies and drugstores are integral to the distribution of sexual wellness products such as condoms, lubricants, and contraceptive pills. These outlets provide a trusted and private shopping environment crucial for consumers purchasing intimate products. The presence of knowledgeable staff also aids in consumer education and product recommendations, making pharmacies a reliable source for sexual wellness products.

### Segmentation by Distribution

- Offline
- Online

## GEOGRAPHICAL ANALYSIS

APAC dominated the global sexual wellness market, accounting for a share of over 40% in 2023. During the same period, China dominated the regional market due to the considerably high demand for sexual wellness products such as sex toys, condoms, and sexual lubricants. The market for sexual wellness products is witnessing high growth in India, China, Japan, and South Korea. Sexual wellness products are also gaining popularity among end users in the APAC region. Moreover, the region was led by Japan, as it is a large adopter of contraceptives, wherein male condoms are the preferred choice. Although China, Japan, South Korea, Australia, and India account for major usage of sexual wellness products in APAC, countries such as Thailand, Vietnam, Malaysia, and Indonesia are also expected to witness high demand due to the improving quality of life and growing acceptance of sexual wellness products in these countries during the forecast period.

Europe accounts for a significant share of the global sexual wellness market. The market in Europe is characterized by high demand for premium sex toys along with water-based and silicone-based sexual lubricants. Furthermore, North America was the third-largest sexual wellness market in 2023, with steady growth and high penetration rates. The region has some of the most advanced economies in the world and is a major market for contraceptives and sexual wellness products due to a properly formulated sex education program and an efficient distribution network. Also, the region has one of the most sexually active populations in terms of the usage of condoms and sexual lubricants. Further, many countries in the Middle East, Latin America, and Africa still show low market penetration and commercial sales for sexual wellness products. However, demand will rise as vendors expand their operations in these regions.

### Segmentation by Geography

- APAC
  - o□China
  - o□Japan
  - o□India
  - o□Australia
  - o□South Korea
  - o□Indonesia
  - o□Singapore
  - o□Malaysia
  - o□New Zealand

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- o Thailand
- o Vietnam
- o Philippines
- o Sri Lanka
- o Rest of APAC
- Europe
  - o UK
  - o Germany
  - o France
  - o Spain
  - o Italy
  - o Poland
  - o Netherlands
  - o Sweden
  - o Denmark
  - o Norway
  - o Rest of Europe
- North America
  - o The U.S.
  - o Canada
- Middle East & Africa
  - o South Africa
  - o Algeria
  - o Nigeria
  - o UAE
  - o Kenya
  - o Saudi Arabia
  - o Ethiopia
- Latin America
  - o Brazil
  - o Mexico
  - o Argentina
  - o Peru
  - o Colombia
  - o Chile

## COMPETITIVE LANDSCAPE

The global sexual wellness market is highly fragmented, with numerous leading vendors. Market consolidation is anticipated to occur gradually. Prominent players in the global sexual wellness market include LifeStyles, Church & Dwight, Diamond Products, Reckitt Benckiser Group, Okamoto Industries, Karex Berhad, and Doc Johnson. The competitive environment intensifies, driven by rapid technological changes and consumer expectations for continuous innovation. Vendors are compelled to refine their value propositions to maintain market presence. The market's fragmentation is further intensified by local vendors offering similar products at lower prices, leading to price wars. International players are likely to expand their presence, challenging regional vendors. Competition will increasingly focus on product features such as quality, technology, services, innovation, and price. The industry is expected to compete more through product extensions, technological advancements, and mergers and acquisitions. Companies with substantial technical and financial resources will have the advantage, potentially making competing products

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obsolete if they fail to keep up with innovation.

#### Key Company Profiles

- Church & Dwight
- Diamond Products
- Doc Johnson
- Karex Berhad
- Lifestyles
- Okamoto Industries
- Reckitt Benckiser

#### Other Prominent Vendors

- Bally
- Beate Uhse
- Beijing Aimer
- Bijoux Indiscrets
- BILLY BOY (MAPA)
- BioFilm
- BMS Factory
- Bodywise
- B.Cumming
- Caution Wear
- CalExotics
- Calvin Klein (PVH CORP)
- Convex Latex
- Cosmo Lady
- Cupid Limited
- Dongkuk Techco
- Double One
- Eau Zone Oils & Fragrances
- European Lingerie Group AB (ELG)
- Embry
- Empowered Products
- Fuji Latex
- Good Clean Love
- Guy & O'Neill
- GLYDE
- Hathor Professional Skincare
- HBM Group
- Hello Cake
- HLL Lifecare
- ID Lubricants
- INNOLATEX LIMITED
- Innova Quality
- Innovus Pharma

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- []Japan Long-Tie (China)
- []KamaSutra
- []KAMYRA condoms
- []L Brands (LVMH)
- []La Maison Lejaby
- []La Perla
- []LELO
- []Live Well Brands
- []Lovehoney Group
- []LTC Healthcare
- []Mankind Pharma
- []Mayor Laboratories
- []MD Science Lab
- []MISTER SIZE
- []MTLC Latex
- []Nulutex
- []Orient Industry
- []PHE
- []pjur group
- []Ritex
- []R&S Consumer Goods
- []Sagami Rubber Industries
- []Sensuous Beauty
- []Shandong Ming Yuan Latex
- []Shanghai Dahua Medical Apparatus/Path
- []Silk Parasol
- []Skins Sexual Health
- []Sliquid
- []StaySafe Condoms (ADVACARE PHARMA)
- []STRATA Various Product Design
- []Suki (OhMiBod)
- []Sustain Natural
- []Tenga
- []Thai Nippon Rubber Industry
- []The Yes Company
- []Tianjin Condoobao Medical Polyurethane
- []Topco Sales
- []Trigg Laboratories
- []Triumph
- []Unique Condoms International
- []Veru Healthcare (The Female Health Company)
- []XR Brands

#### KEY QUESTIONS ANSWERED:

- 1.[]What are the significant trends in the sexual wellness industry?
- 2.[]What is the growth rate of the global sexual wellness market?

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3. How big is the global sexual wellness market?
4. Which region dominates the global sexual wellness market share?
5. Who are the key players in the global sexual wellness market?

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