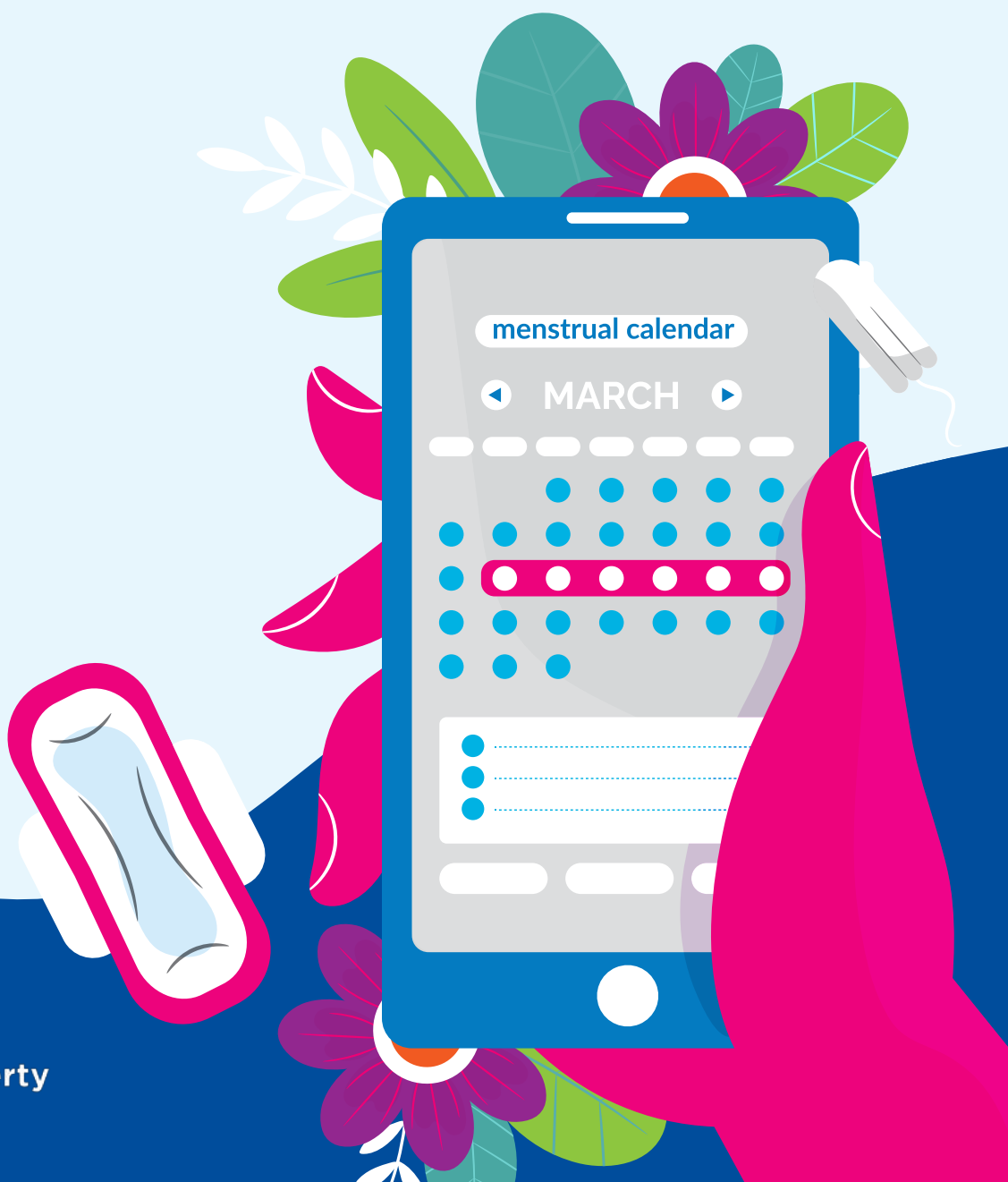


SNAPSHOT: MENSTRUAL CARE PATENTS

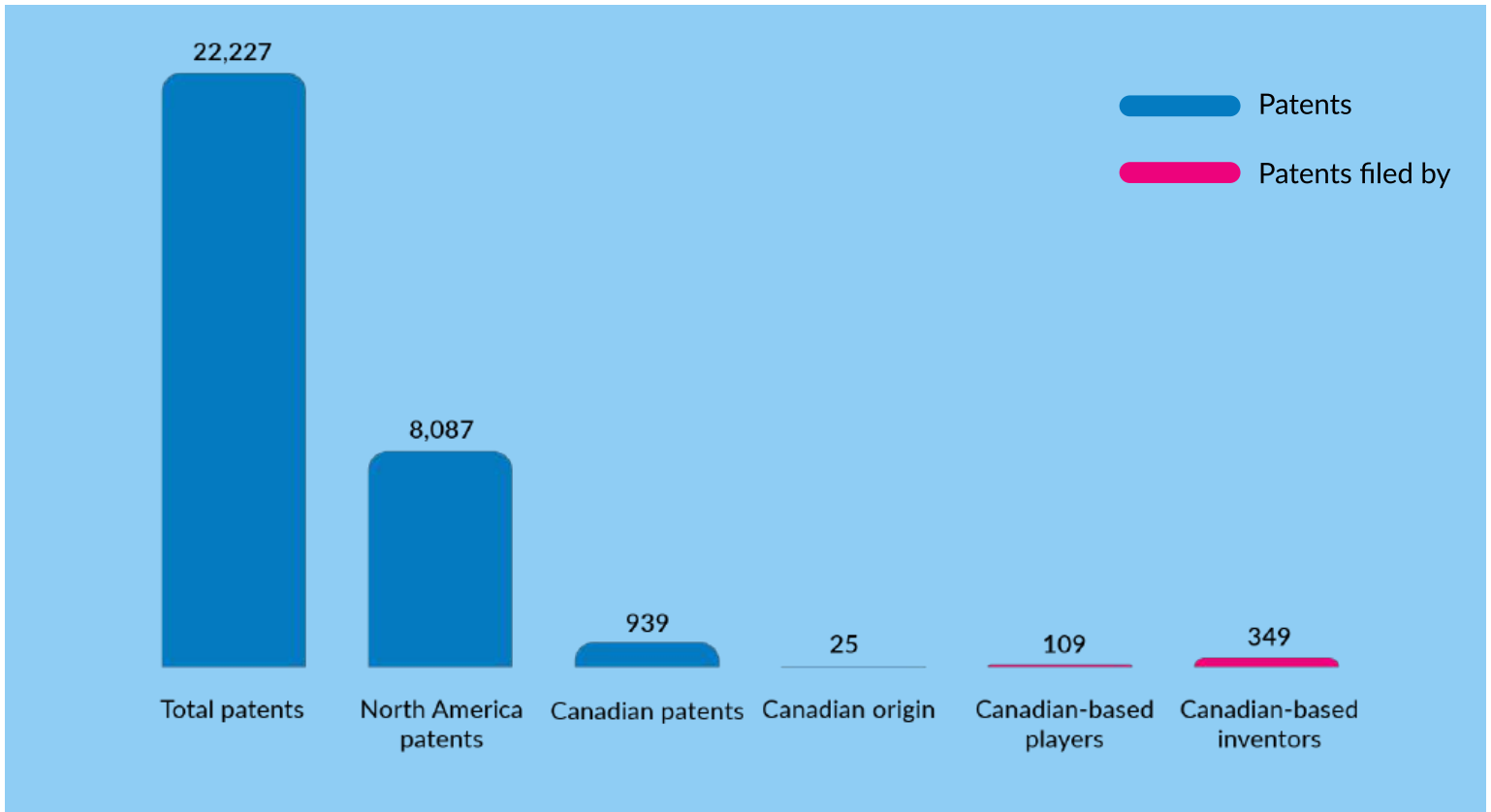
Scope

This patent landscape study provides an overview of the menstrual care industry, focusing on patents filed in the USA, Canada and Mexico, as well as under the Patent Cooperation Treaty (PCT) on or after January 1, 2004.

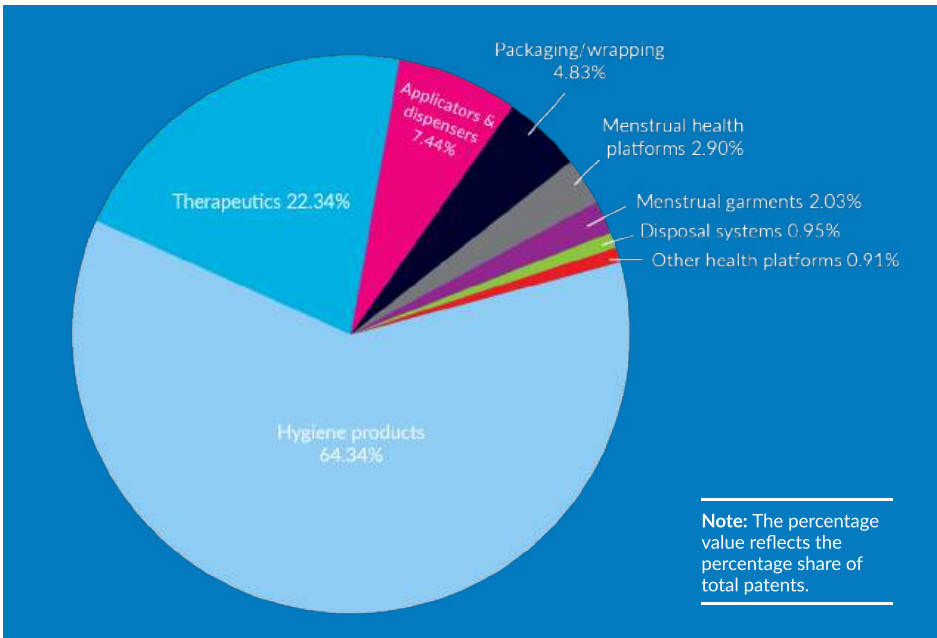


MENSTRUAL CARE IN NORTH AMERICA

Quick stats

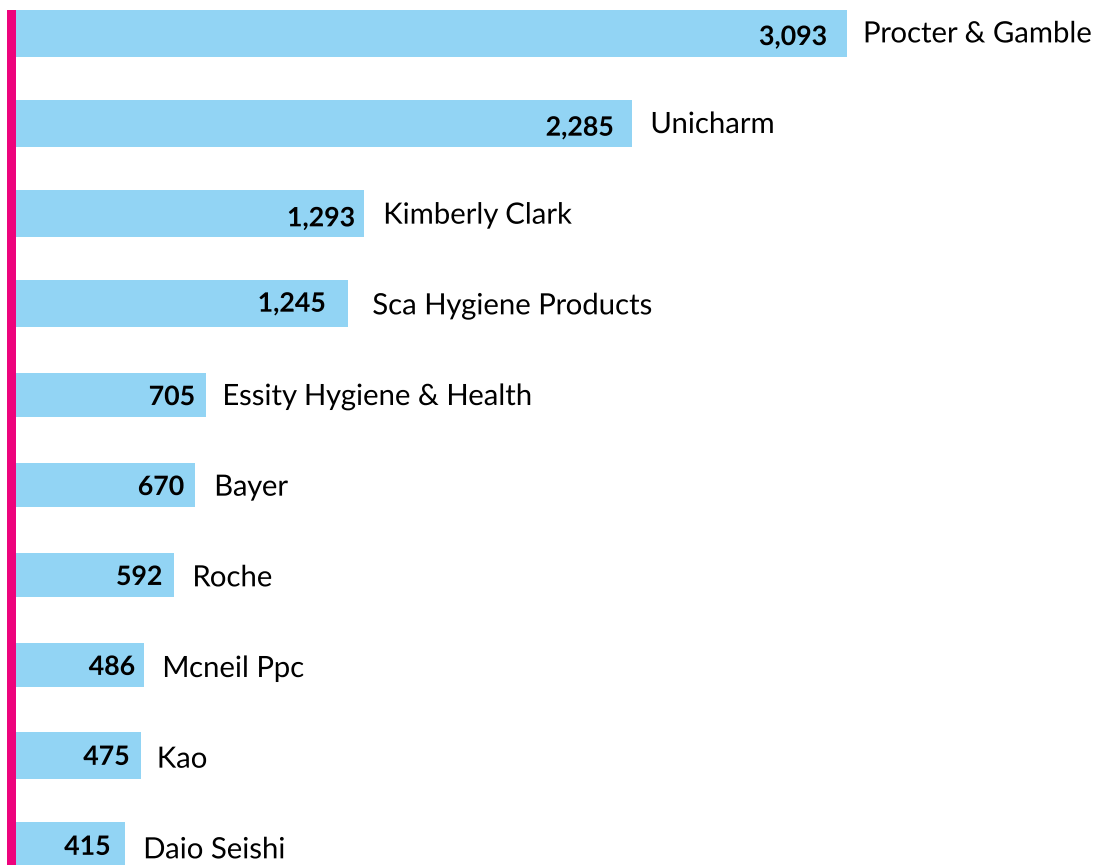


Technology segments



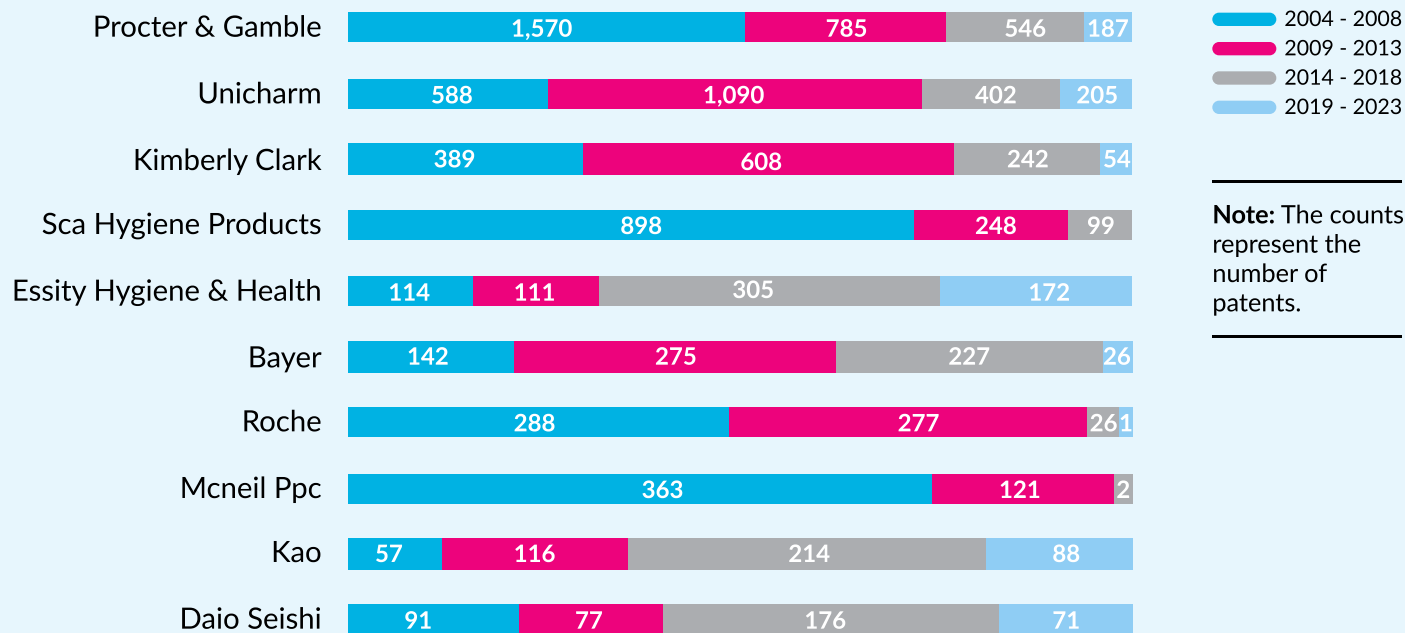
- + Hygiene products are the top focus in menstruation innovation, representing the most mature and dominant segment.
- + Extensive R&D is driving eco-friendly and sustainable period care, with organic and biodegradable products growing in popularity.
- + Growing digital health platforms, apps and wearables are transforming menstrual care with innovative solutions.
- + Pads and tampons still dominate the global market, but reusable options like menstrual cups and period panties are gaining traction.

Top players



Note: The counts represent the number of patents.

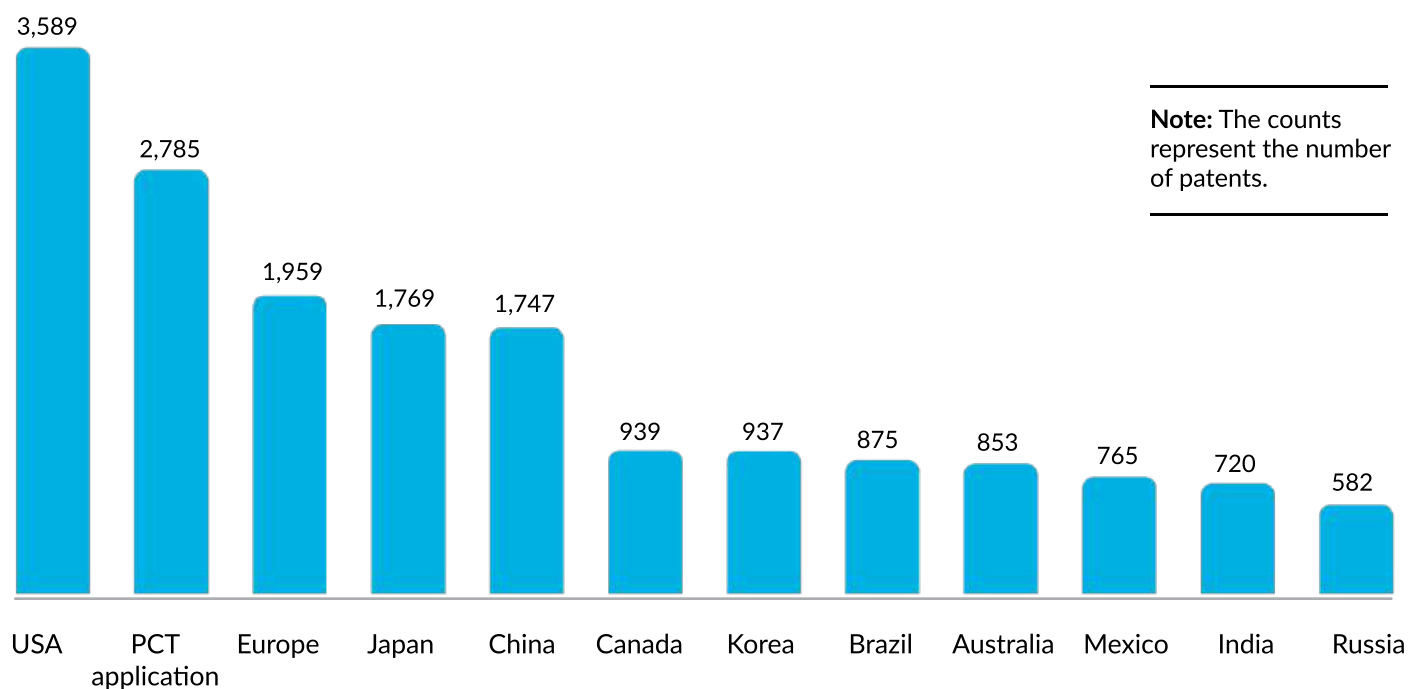
Top players' activity



Note: The counts represent the number of patents.

- + Top players have slowed down in patent filings over the last 5 years, but Essity Hygiene & Health, Kao, and Daio Seishi are ramping up innovation.
- + Most commercial players focus on hygiene tech, while Roche and non-commercial players focus more on therapeutics.

Top markets

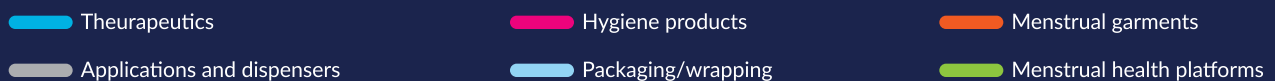
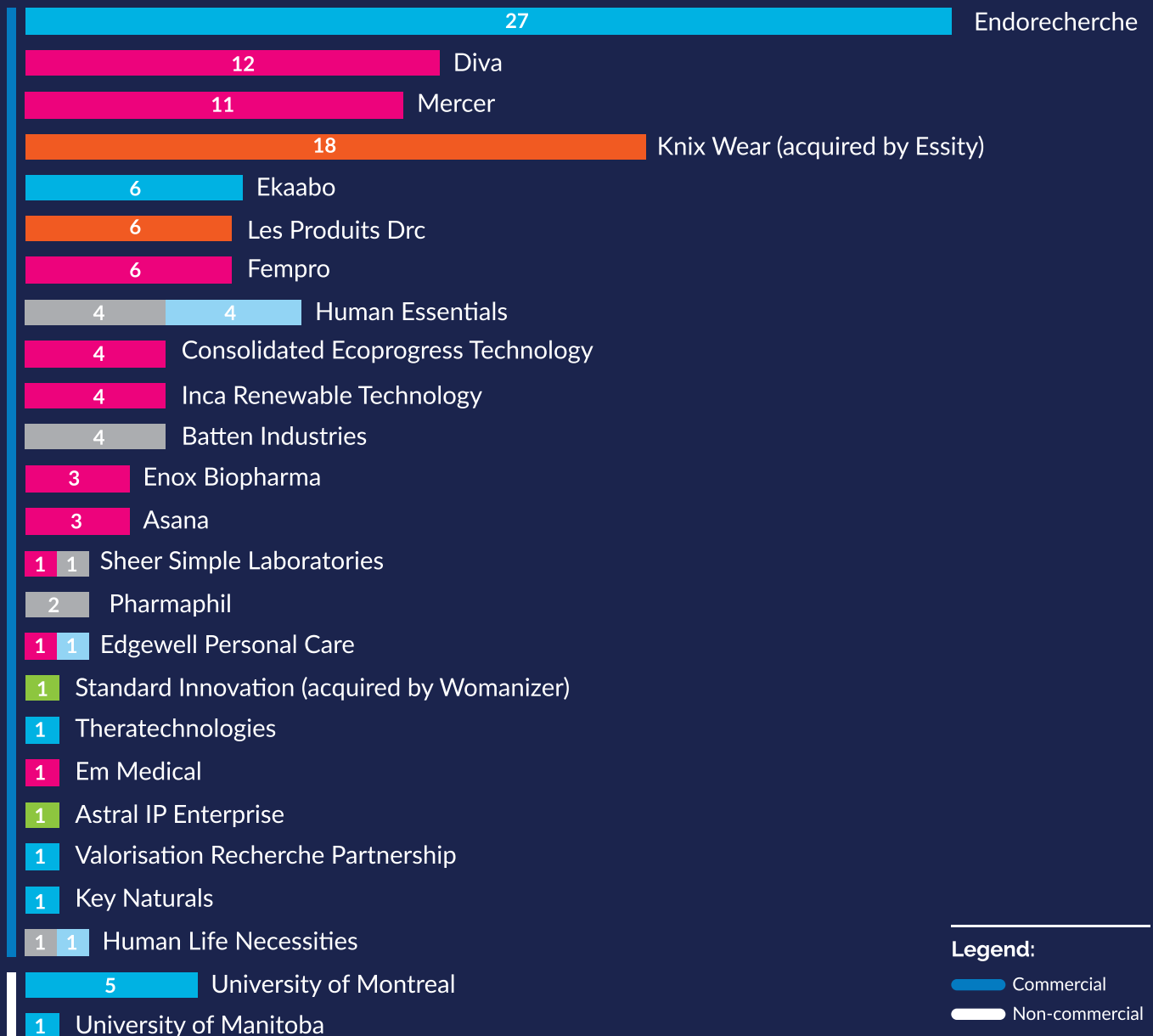


- + The North American period care market is highly patent protected, while the Asia-Pacific market is expected to grow at a **5.2% compound annual growth rate**, exceeding the global average of 4.2% from 2022 to 2031.



Canadian players

- + Canadian companies are innovating in menstrual products, but academic involvement remains low.
- + Companies like Human Essentials and Inca Renewable Technology are driving patent filings in menstrual care, indicating a focus on innovation and new markets.
- + Canadian players show no activity in disposal systems and have limited interest in packaging compared to other product areas.



APPENDIX

Definitions

- + **Patent:** Refers to an issued patent or a pending patent publication. Each issued patent usually has an associated earlier patent publication, and both are considered as one patent. A patent may be referred to as a “Filing” herein.
- + **Total patents:** Refers to the total number of patents filed in the North American region and their counterparts in other jurisdictions.
- + **North American patents:** Refers to the number of patents filed in the North American region including USA, Mexico, Canada, and PCT applications.
- + **Canadian patents:** Refers to the total number of patents filed in Canada.
- + **Canada origin:** Refers to patents first filed in Canada.
- + **Canada-based players:** Refers to patents filed by Canadian companies.
- + **Canada-based inventors:** Refers to patents filed by individual Canadian inventors or researchers.
- + **Patent Cooperation Treaty (PCT) application:** Refers to an international patent application which enables an applicant to seek patent protection simultaneously in multiple member countries.

Data source

- + A proprietary patent database was used to retrieve patent data pertinent to various technology categories viz., hygiene products, therapeutics, applicators and dispensers, packaging/wrapping, menstrual health platforms, menstrual garments, disposal systems, and other health platforms, by means of keywords, CPC class codes, or combinations thereof.

Analysis

- + The patent search is restricted to the title, abstract, and claims fields of the patents, which means any patents discussing menstrual technology in other fields of the patents, such as in description/background, are not included in the dataset.
- + One patent per FamPat family is analyzed and the final dataset is visualized based on individual patent counts. Individual patents are retrieved by expanding North American patent families and collapsed by unique patent application numbers.

Disclaimer: This patent landscape report is released for educational purposes only. Please note that the report may not include all patents relevant to the study due to various limitations, including but not limited to the scope of the research, the date of the search, the keywords, patent classifications, and patent data fields used in patent searching, and the restriction to publicly available data. The mention of specific companies or products does not imply IPON's endorsement or recommendation over others not mentioned.

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