

Enhancing access to menstrual care products

Preliminary findings from the rapid total market landscaping of menstrual care products in Kenya

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Menstrual health landscape: Global challenges



PATH/Tanya Dargan

- Much of the research lacks in rigor
- Small entrepreneurs are making products
- Few countries have quality standards (Kenya is an exception)
- Lack of organized supply systems
- Markets are not addressing the bottom of the pyramid

Applying a Total Market Approach (TMA) to menstrual health

Definition of TMA

Government coordination and support of public and private stakeholders to leverage their comparative advantages to enhance equitable access to priority health products and services.

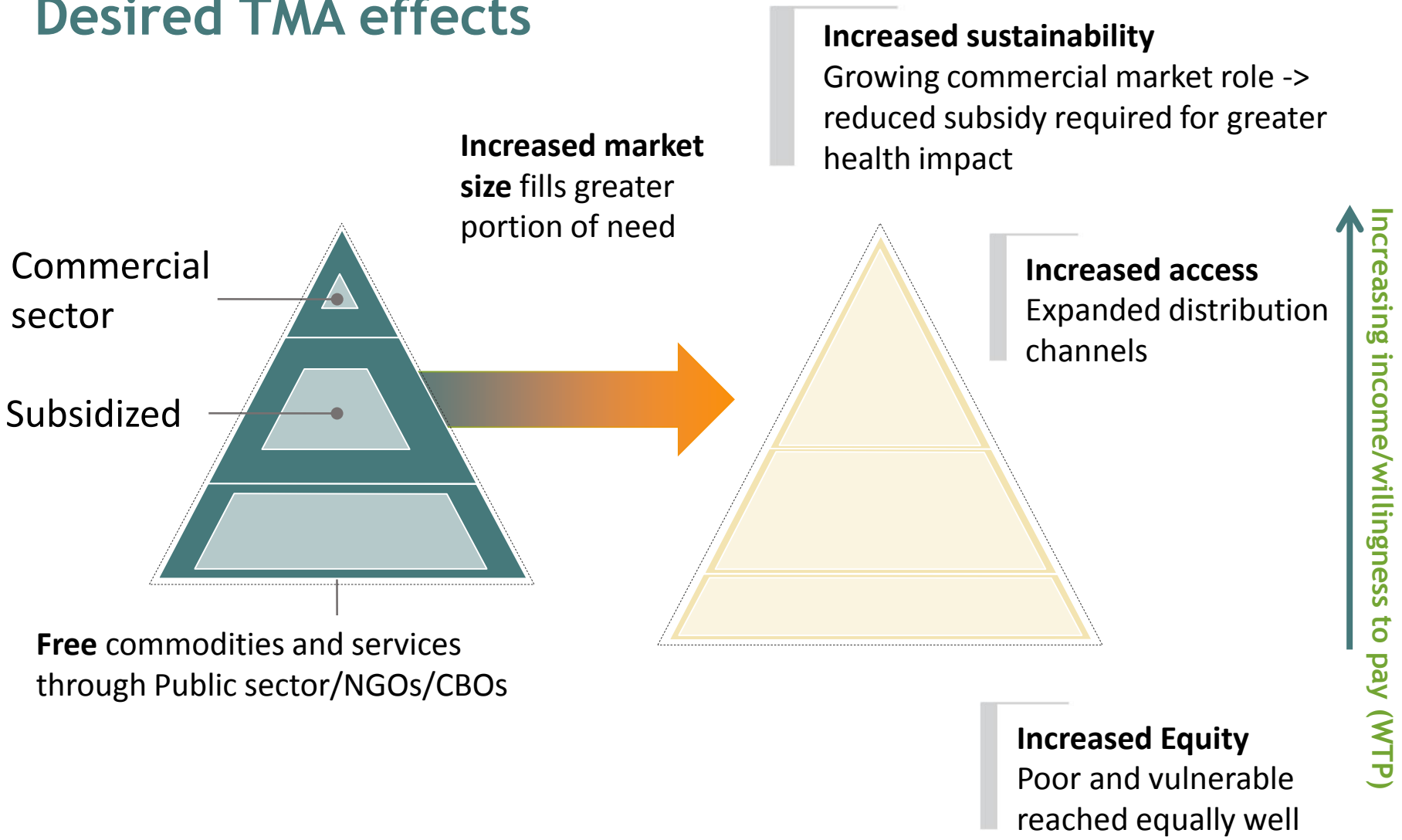
Goal

- To increase access, particularly for the most vulnerable, underserved groups.
- To enhance financial sustainability of public-sector funding.



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Desired TMA effects



Why Kenya?

- Government of Kenya's program to provide free menstrual pads to school girls
- Dynamic policy environment
 - Plans to develop policy on menstrual hygiene
 - Existence of product standards for disposable pads
 - Discussions about product standards for reusable pads
- Vibrant private sector in Kenya producing a range of menstrual care products



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Key findings from Kenya TMA

- **Policy context**
 - Commitment of national budget for pad program: KSH 600,000,000 projected 2016/2017
 - Development of “policy” guidelines planned
 - Standards for disposable pads developed
 - Reusable pads under consideration
- **National free pad program**
 - Managed by Ministry of Education
 - Goal is to keep girls in school
 - 700,000 girls (class seven and eight) targeted nationally
 - Procurement
 - Two Kenyan companies
 - Three Chinese companies
 - No evaluation conducted



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Key findings from Kenya TMA

- **NGO models**
 - Menstrual health programming for girls: free pads, WASH in schools, curricula, empowerment, innovative distribution
 - Coverage for a few thousand girls per year/organization.
 - Individual and small foundation donors
- **Social enterprise models**
 - Product (disposable pads, reusable pads, menstrual cup) financing by private donors
 - Virtually no penetration of commercial market to date
 - Largely distributed/purchased through NGO partnerships
 - Some combine with education
- **Commercial sector**
 - Disposable pads available in large cities

Preliminary conclusions

- National pad scheme is important and needs to be evaluated
- Stakeholders are diverse, engaged, and lack coordination
- Women's needs generally are not addressed
- Significant unmet need and gaps in the bottom of the period market
 - Critical need for market research
- Potentially important role for social marketing organization
 - Unclear if large donor organizations in Kenya will engage

Preliminary recommendations

- Coordinate: Hygiene Promotion Technical Working Group:
 - Generate and share information to build a total market
- National governments continue to increase menstrual product budget and to encourage county commitment
- Conduct independent evaluation of the government pad program



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Preliminary recommendations

- Conduct market analysis/research
 - Forge sustainable strategies to increase awareness, access, and affordability across a range of products/brands
 - Social marketing actors consider how to support the market
- National policy guidelines
 - Clarity on goals, approaches, and costing/financing of comprehensive menstrual care programming
- Recommendations on reusable product standards
 - Evidence-based
 - Assess relative advantages and disadvantages of current practices and available alternatives