



RHSC Webinar

Identifying supply-side factors impacting access to menstrual health products in sub-Saharan Africa and Asia

Mann Global Health

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For more information:

Chastain Mann: chastain@mannglobalhealth.com

Lucy Wilson: lucy.wilson@gmail.com

Chris Jones: chris@jonesglobalinsights.com

Nayantara Watsa: nwatsaconsulting@gmail.com

Tanya Mahajan: tanyadargan@gmail.com

Halima Lila: halimalila1@gmail.com

Jennifer Amadi: jen.amadi@gmail.com

Wawira Nyagah: wnyagah1n@gmail.com

Photo: Jonathan Torgovnik/Getty Images/Images of Empowerment

Today's Agenda

Agenda

- I. Welcome
- II. Presentation of findings
- III. Recommendations and framework
- IV. Panel discussion
- V. Discussion / Q&A

Terminology

- ❖ For the purposes of this report, *MH products* refers to commercially-made:
 - ❖ disposable pads
 - ❖ tampons
 - ❖ reusable pads
 - ❖ menstrual cups
- ❖ We use the gender-inclusive term *menstruator* to denote anyone who uses MH products.

II. Presentation of Findings



Photo: Lucy Wilson

Project Aims & Process

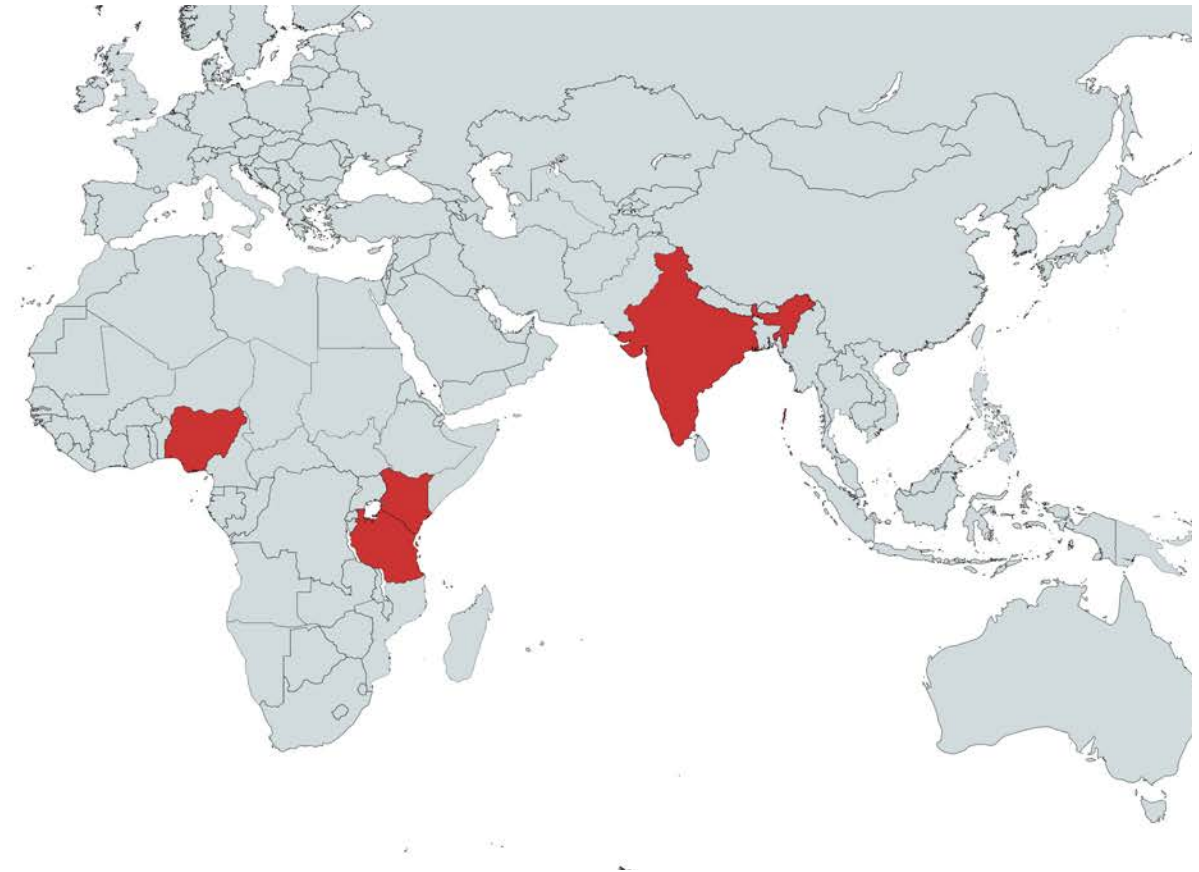
Aim: Inform program decision-making for tailored menstrual health (MH) market interventions that are aligned to realities on the ground.

Process: Map the ecosystem that links menstruator's access to MH products, different patterns of product flow, and different commercial considerations to identify constraints impacting access to quality products. **The analysis focused on supply and access constraints.**



Countries Selected for Deep Dives

Country	Thought Partner
Tanzania	Halima Lila
India	Tanya Mahajan
Nigeria	Jennifer Amadi
Kenya	Wawira Nyagah



II.I Topline Findings

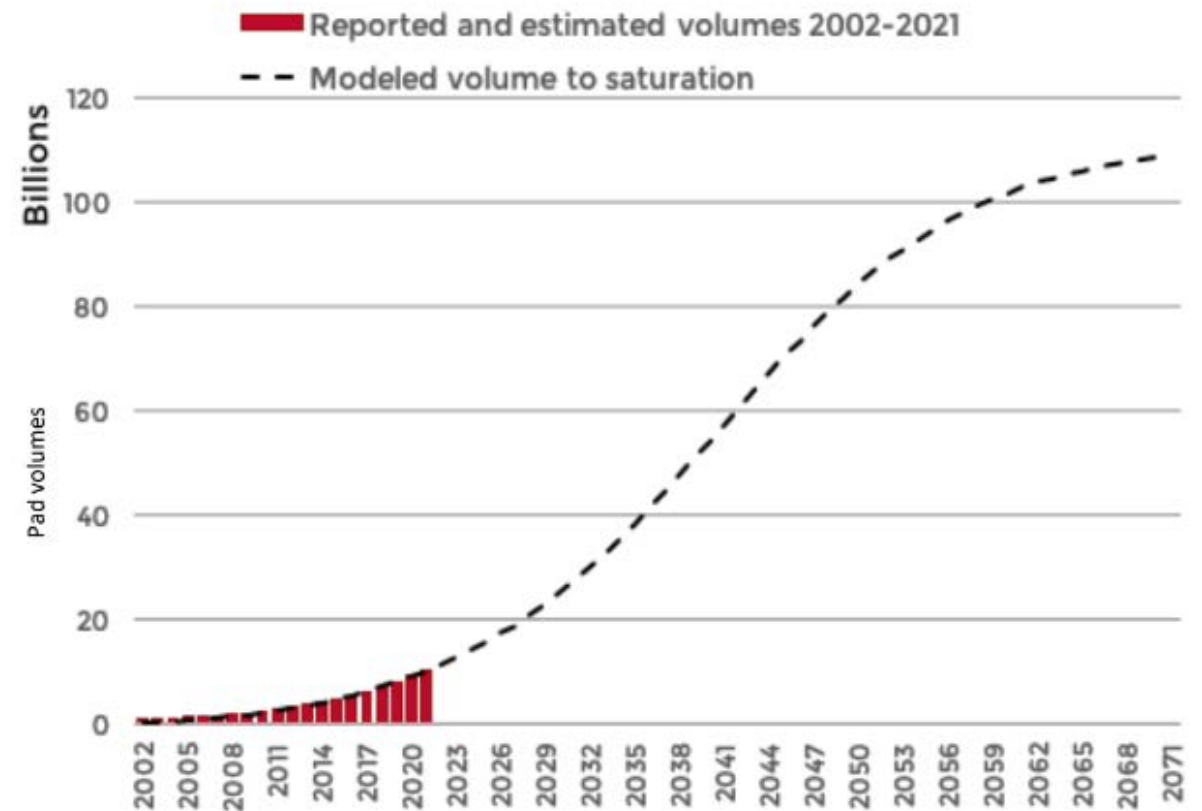


Photo: PATH

A Snapshot of Global MH Market Trends

- ❖ More than **500 million menstruators** globally lack access to “everything they need” to manage their menstruation.¹
 - ❖ Equates to **one-fourth of the global female population** of reproductive age.
- ❖ The **MH market is growing rapidly** and has huge potential for future growth.
 - ❖ In India, **sales volume is doubling every 5 years**, but still only about 10% of potential.²
- ❖ On an individual level, **urban, wealthy, and educated** are most likely to use commercial MH products.³
- ❖ This reflects the challenges in **access, affordability, and awareness** that lead to latent demand and limited use of commercial MH products.

Projected retail sales of MH products in India shows rapid growth with only a fraction of need met.²



Barriers to Access

Persistent and fundamental challenges related to **access, affordability,** and **awareness** constrain the supply of quality MH products.

- ❖ **Manufacturing** and sourcing **raw materials** at levels of scale required for efficiency is capital intensive and challenging.
- ❖ Inefficient fragmented **supply chains** limit availability and lead to high retail prices.
- ❖ **Limited awareness** of MH product options (types, brands, quality) limits actual demand, and thus supply.
- ❖ **Inherent challenges** with current products limit acceptability, ease-of-use, quality, affordability, and environmental sustainability.

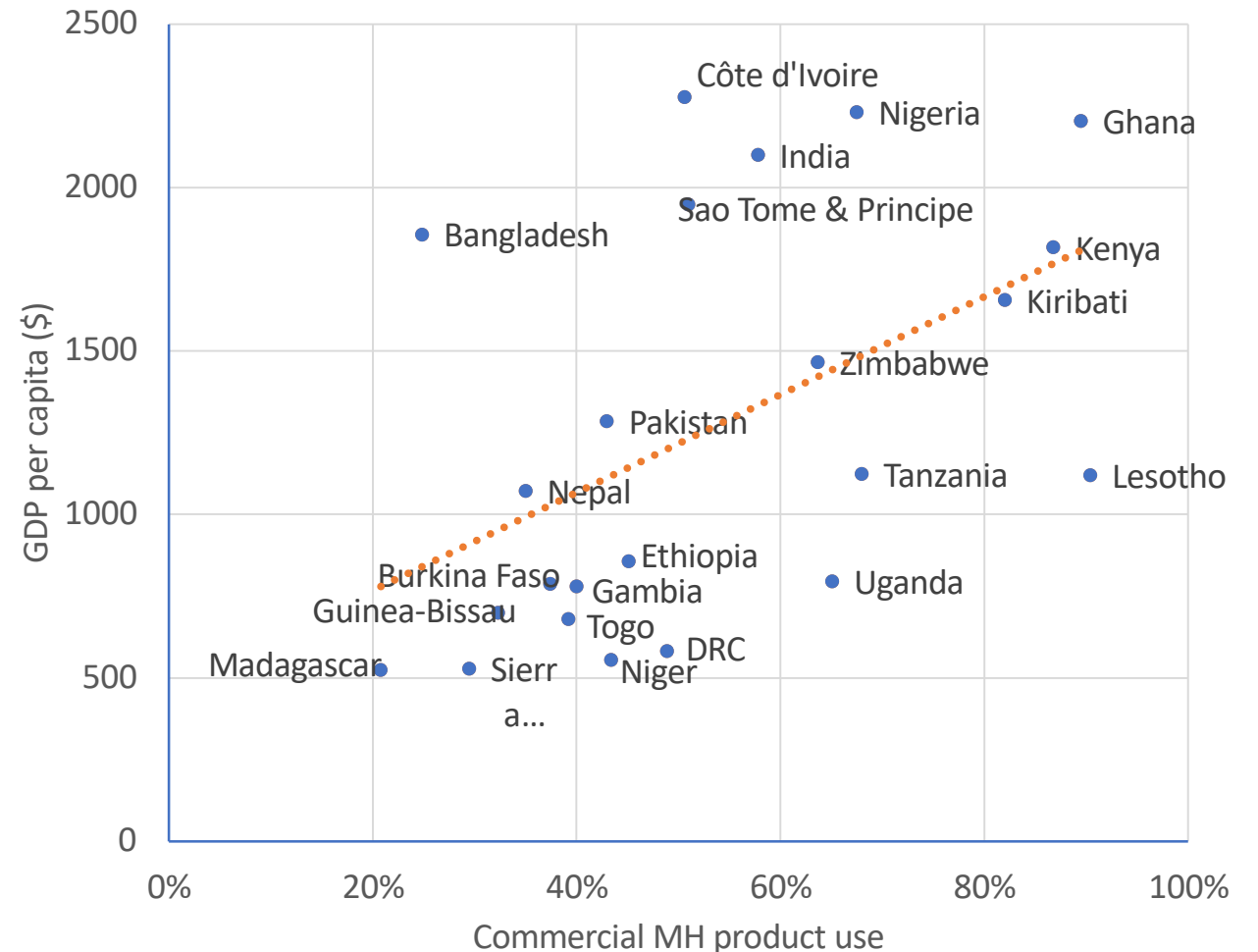


Photo: White Ribbon Alliance / Creative commons

Other Topline Findings

- ❖ **Income matters** - Higher per capita GDP is strongly associated with higher use of commercial MH products.¹
- ❖ **Social enterprises** are proliferating and seen as promising, but face steep challenges for sustainability and scale.
- ❖ **Distribution innovations** also promising but require additional evaluation.
- ❖ **Choice matters** – Menstruators need quality product choice and innovations to meet context driven needs.

Correlation between per capita GDP and commercial MH product use (1)



References: (1) Use estimates based on 33 Multiple Indicator Cluster Surveys (MICS) and 9 PMA2020 surveys, analyzed by Avenir Health for RHSC. Per capital GDP data from World Bank.

II.II. Market Structure and Business Models



Photo : Jonathan Torgovnik/Getty Images/Images of Empowerment

Upstream Business Models: Brand Owners

Business Model	Product type(s)	Primary Function	Examples
Cottage industry manufacturer	Disposable and reusable pads	Manufacturing, Marketing, Distribution & Sales	Micro-enterprises and community-based organizations, sometimes supported by groups like Pad Project, Days for Girls, Aakar Innovations, etc.
Social enterprises	All	Design and/or Manufacturing, Marketing, (some) Distribution	AFRIpads, ZanaAfrica, BeGirl, Ruby Cup, etc.
Mid-tier manufacturers and importers	Disposable pads	Manufacturing and/or Importing, Marketing, (some) Distribution	Kay's Hygiene and Freestyle in Tanzania; Square Toiletries in Bangladesh; LadyCare in Nigeria, etc.
Multinational corporations (MNCs)	Disposable pads, tampons	Design and/or Manufacturing, (some) Importing, Marketing	Procter & Gamble, Kimberly-Clark, Unicharm, etc.

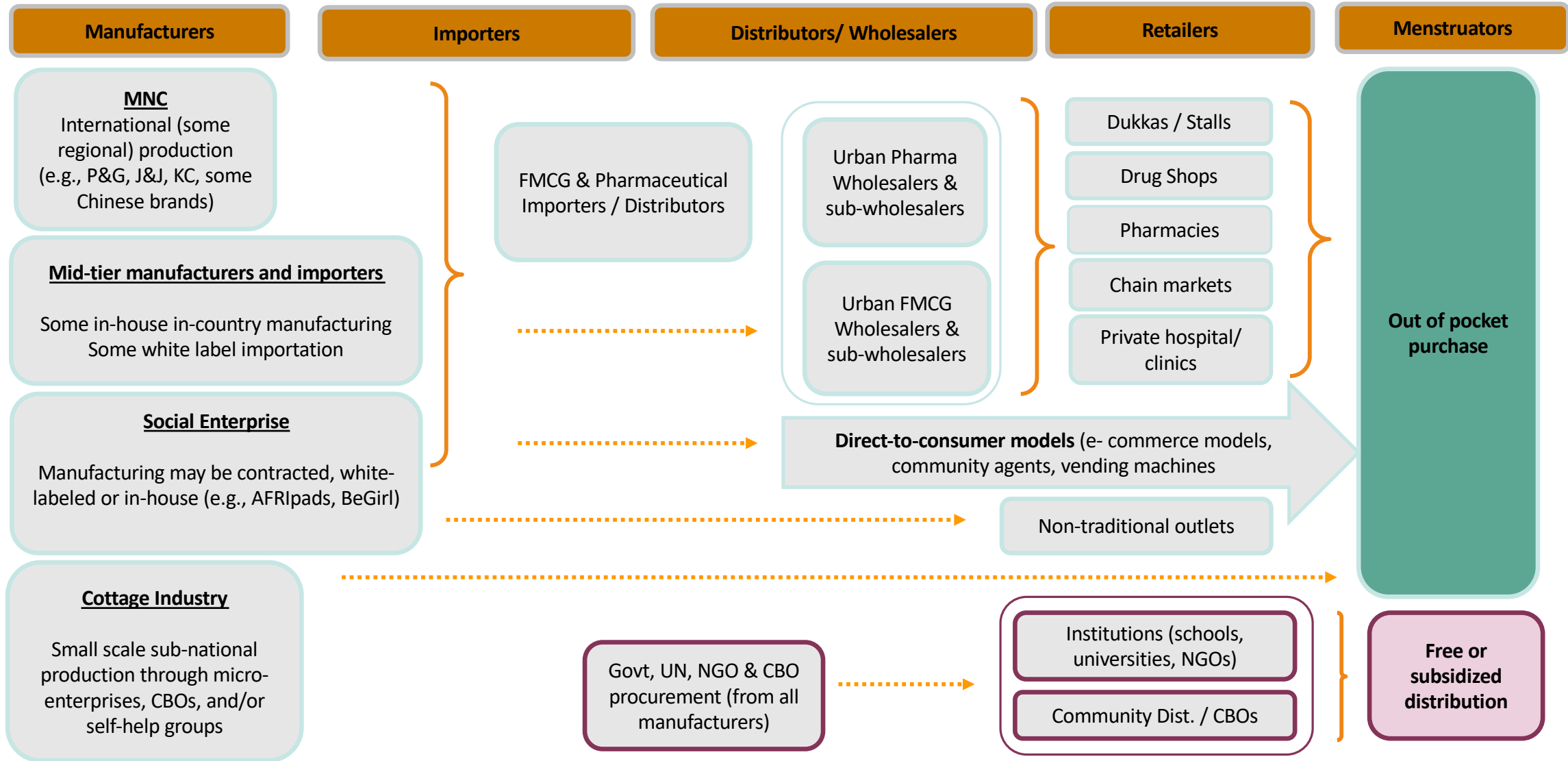
Innovative Business Models Driving Distribution

Business Model	Product type(s)	Primary Functions	Description / Examples
Direct-to-consumer	All	Distribution bypassing traditional retail outlets, Sales, (some) Marketing, and Education	<ul style="list-style-type: none"> • E-commerce, including with community agents and depots, e.g., Kasha, Jumia, Cobia, FlipKart • Dispensers/vending machines, e.g., Yz-Me in Kenya, Pad2Go in Nepal
Institutional free/subsidized distribution	All	Distribution, Education, (some) Marketing	<ul style="list-style-type: none"> • In schools, humanitarian settings, etc. • By governments, UN, NGOs, MNCs, etc. • Often also provide education and awareness • Generally supportive of the overall market • Sometimes via cash subsidies/vouchers (UN)

Overall Market Structure and Supply Chain

Supply chain structure from manufacturer to menstruator

.....> Flow of product Commercial Sector Public Sector



II.III. Core Market Function Analysis



Photo: Afripads

Core Market Function: Product



Photo:Vulvani

Insights, Challenges, & Opportunities

- ❖ **Disposable pads are the dominant commercial product**, with global brands leading market share in most, but not all countries.
- ❖ **Social enterprises** supporting **reusable products** are beginning to get some **commercial traction**. Knowledge of these products remains low.
- ❖ **Informed product choice is critical** – menstruators benefit by choosing among a range of options that meet their needs and allow for mixed use.
- ❖ A proliferation of brands includes a wide **variation in quality**.



Core Market Function: Place (Access)

Insights, Challenges, & Opportunities

- ❖ **MH products are broadly accessible at retail outlets in urban areas.** Availability in rural areas is limited, especially for reusables.
- ❖ **In-country distribution** of finished products through FMCG and pharma distribution channels is often inefficient, which leads to high retail prices. Some companies are able to manage it successfully.
- ❖ **E-commerce and other direct-to-consumer** platforms are promising. Experimentation with other non-traditional outlets & channels has mixed results.
- ❖ **Free or subsidized distribution**, especially via schools, is an important distribution route in many settings.



Photo: Divyakant Solanki. EPA-EFE

Core Market Function: Promotion (Awareness / Demand)

Insights, Challenges, & Opportunities

- ❖ **Lack of education/awareness** is one of the biggest challenges.
- ❖ Many suppliers combine product promotion with **school-based puberty education**.
- ❖ Most **brand promotion** targets urban middle- and upper-income populations with aspirational messages.
- ❖ **Negative advertising and misleading marketing claims** are prolific.
- ❖ **Stigmas and taboos** associated with menstruation challenge the market at various levels.



Photo: Kenya STAR

Other Supporting Functions



Photo: Kenya STAR/Bebuzee

Insights, Challenges, & Opportunities

- ❖ Where **strong MH coalitions** exist, the support for advocacy and coordination among actors appears to be important.
- ❖ Development of **product quality standards** is growing.
- ❖ Standards are beneficial not only in ensuring quality products for consumers, but also can facilitate **entry of new product** types and brands into market.
- ❖ MH has comparatively little interest from **funders**. However, the **commercial potential** of the MH market presents significant opportunity.

III. Recommendations and Framework



Photo: Vulvani

Overarching Recommendations

Our assessment led to 16 recommendations, which were then summarized into four **overarching recommendations**:



- Incentivize **product choice**, which underpins use



- Support **market actors** to grow scalable, sustainable businesses



- Improve **distribution** to allow for greater access and affordability



- Support **awareness building**, demand generation, and the evidence to inform future work

Linking interventions to funders, implementers and beneficiaries

Our overarching recommendation is to **incentivize product choice, which underpins use**

Recommended Interventions	Potential Funder	Recipient / Implementer of Funding	Beneficiary Business Model
Develop product standards and their fair and effective enforcement	<ul style="list-style-type: none"> • Governments • Traditional funders 	<ul style="list-style-type: none"> • Governments • Market Facilitators / Intermediaries 	<ul style="list-style-type: none"> • Cottage industry manufacturers • Social Enterprises • Mid-tier manufacturers • MNCs
Incentivize the design of innovative products	<ul style="list-style-type: none"> • Traditional funders • Market actor self-investment • Innovative blended finance mechanisms 	<ul style="list-style-type: none"> • Social Enterprises • Mid-tier manufacturers 	<ul style="list-style-type: none"> • SEs • Mid-tier manufacturers
Ensure menstruators are aware of and have access to full product choice	<ul style="list-style-type: none"> • Traditional funders • Innovative blended finance mechanisms 	<ul style="list-style-type: none"> • NGOs/SMOs • Governments • Market facilitators/intermediaries • Distributors 	<ul style="list-style-type: none"> • All business models

The MH Market Intervention Framework

The **MH Market Intervention Framework** aims to:



- help stakeholders **understand their MH Market...**
 - by describing the dynamics of a MH market, including strengths, weaknesses and opportunities of different market interventions for enhancing access



- **inform intervention selection and design...**
 - by linking recommendations and interventions to variables impacting MH market access and distribution barriers faced by poor and/or marginalized menstruators

The tool is designed for donors, community actors, governments, manufacturers, and distributors.

Variables in the MH Market Intervention Framework

Variables in the framework include:

- ❖ **Recommendations**, which are mapped against
- ❖ **Market functions** critical to a healthy market, and
- ❖ **Key actors** in the supply chain
- ❖ **Market maturity spectrum**
 - Drawing context from parameters of a healthy market



Photo: Wateraid/Kate Holt

MH Market Maturity Spectrum Rapid Assessment Tool

Elements	Country Assessment*
Market Fundamentals	
Coalition/Coordination: e.g., active MH working group; commercial actors actively engaged in a coordinating body	
Government Leadership: At least one clear MH focal point; active participation from national government representatives	
Standards/Registration: Existence of and fair enforcement of product standards, clear registration process	
Policy: National MH policy or plan exists & actively used	
Tax environment: Natl. tax policies support MH product access	
Market Environment	
Social enterprises: Presence of SE	
Mid-tier and local manufacturers: Presence of manufacturers	
MNCs: Presence of MNC brands in country	
Market Breadth and Depth	
Product and price: Range of price points and product variants	
Place: The extent to which MH products are accessible	
Promotion: Brand owners / other actors actively promote products	

*Assessment Options:

- Not yet present / Not enough information
- Emergent
- Expanding
- Advanced

The MH Market Intervention Framework

Market Maturity



Less Mature

Coordination & coalition building

Stigma reduction

Support targeted free/subsidized distribution

Emergent

Expanding

Advanced

More Mature

The MH Market Intervention Framework

Market Maturity



Less Mature

Coordination & coalition building

Stigma reduction

Support targeted free/subsidized distribution

Emergent

Fair enforcement of product standards

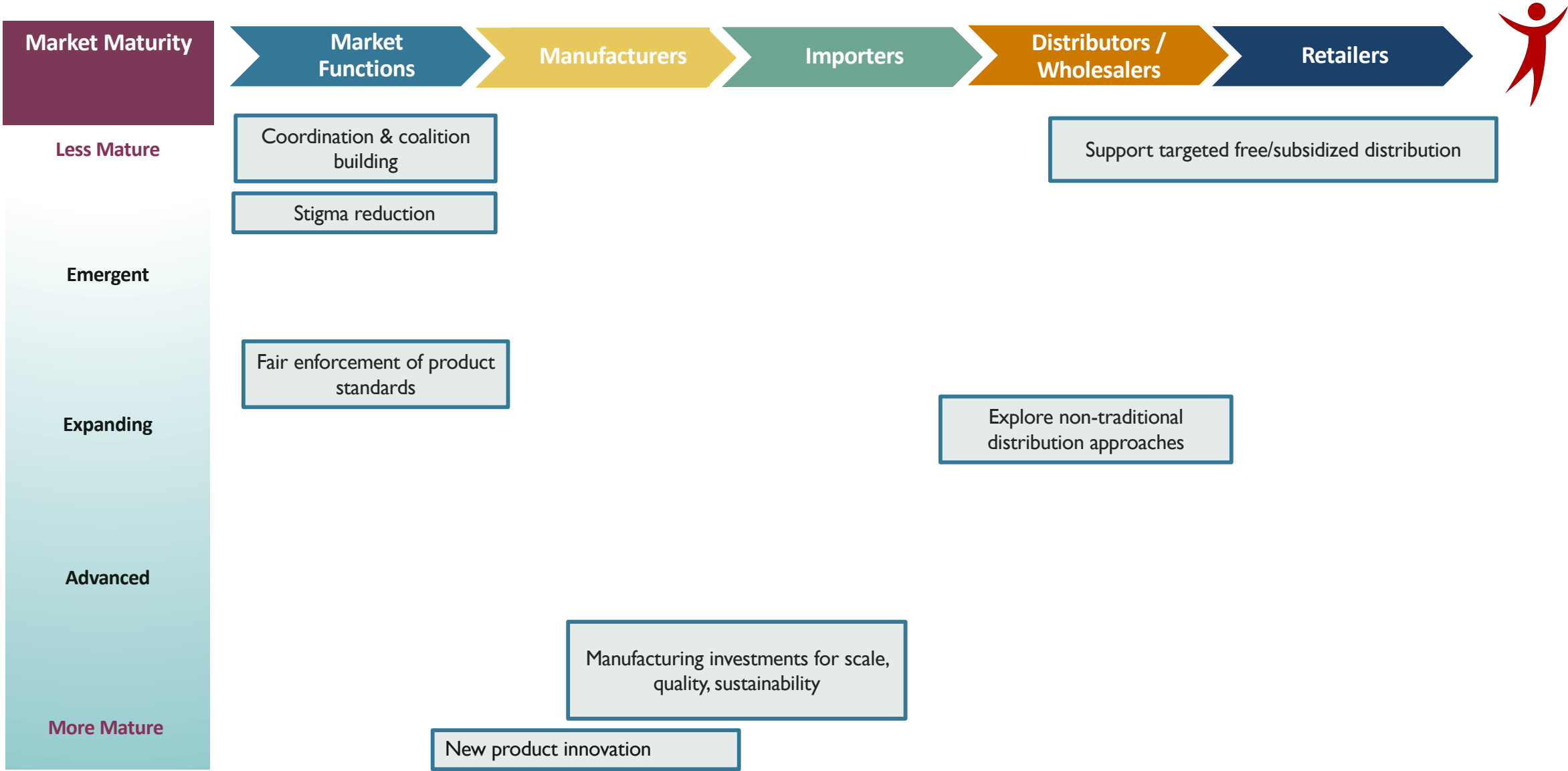
Expanding

Explore non-traditional distribution approaches

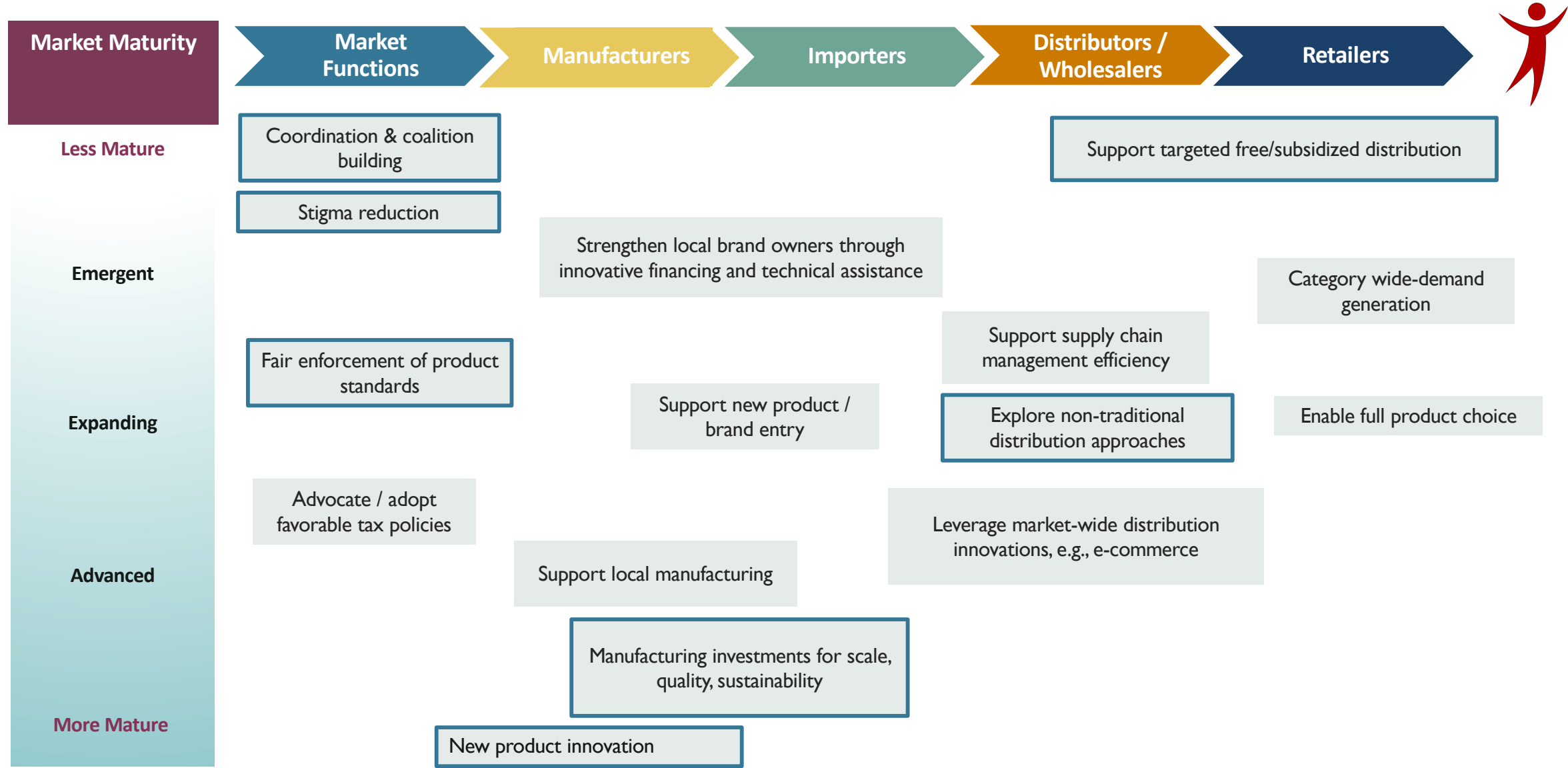
Advanced

More Mature

The MH Market Intervention Framework



The MH Market Intervention Framework



V. Panel Discussion



Photo credit: Lucy Wilson

Local Mid-tier Manufacturer: Kay's Hygiene Products, Ltd.

Presented by:

Halima Lila

Tanzania



Photo: Kay's Hygiene Products, Ltd.

Direct-to-consumer sales: Vending machines & e-commerce

Presented by:

Wawira Nyagah

Kenya



Photos: Kasha, Yz-Me

Disposable Pad Machine Manufacturers

Presented by:

Tanya Mahajan

India



Photo: Saral Designs

SWACHH 3.0

Barriers to product entry: Registration and taxes

Presented by:

Jennifer Amadi

Nigeria

 **NATIONAL AGENCY FOR FOOD AND DRUG ADMINISTRATION AND CONTROL**

NAFDAC CORPORATE HQ:
Plot 2032 Olusegun Obasanjo Way,
Wuse Zone 7, Abuja
Tel: +234-9-6718008
E-mail: nafdac@nafdac.gov.ng
website: www.nafdac.gov.ng

LAGOS LIAISON OFFICE:
Central Laboratory
No 3/5 Oshodi Apapa Expressway
Lagos State.
Tel: +234-1-4730643

30TH MARCH 2021

Your Ref: Our Ref: Date:

DRUG REGISTRATION AND REGULATORY AFFAIRS DIRECTORATE
registration@nafdac.gov.ng

THE MANAGING DIRECTOR,
NAMJID COMM. LIMITED
49A, MILVERTON AVENUE, ABA
ABIA STATE

NOTIFICATION OF PRODUCT REGISTRATION

I am directed to inform you that the under listed product has been registered by the Agency with the following details:

TYPE OF REGISTRATION: IMPORTED NEW REGISTRATION

PRODUCT NAME/VARIANT: SAFEPAD REUSABLE SANITARY PAD

PACK SIZE: 1 X 4PCS

NAFDAC REG NO.: 03-8098

COMPOSITION/ACTIVE INGREDIENT(S): BROAD-SPECTRUM ANTIMICROBIAL ACTIVITY OF QUARTERNARY AMMONIUM SURFACTANTS (QAS)

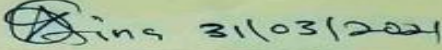
MANUFACTURER: CARENOW MEDICAL PVT. LIMITED
3/8080, NOSHIPALAYAM ROAD, VERAPANDI-POST,
TIRUPUR 641605, INDIA

AMOUNT PAID IN WORDS: ONE HUNDRED AND THIRTY FIVE THOUSAND NAIRA ONLY ₦135,000

For collection of your certificate when ready, please bring the following: - ₦135,000

1. Original Notification of product registration.
2. Identification document (Company ID card or letter of authorization)

Regards,


AINA OLUGBENGA STEPHEN
For: DIRECTOR GENERAL (NAFDAC)

Approved at: FDRC of: 29TH MARCH, 2021

Name of Bank: ZENITH BANK

NAFDAC Treasury Receipt No/DATE: 001245833/26-02-20197

NOTE:
THIS NOTIFICATION IS VALID TILL ONE YEAR AFTER DATE OF FDRC APPROVAL (28TH MARCH 2022)

Stamp: ADMINISTRATION & CONTROL (NAFDAC) Director, Registration Regulatory Affairs Directorate

Photo: RealRelief

Wrap-Up

Questions?

Coming soon!

**Final report on
RHSC website
www.rhsupplies.org**



Photo: Knit Together Initiative

THANK YOU!



Photo: Knit Together Initiative