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: tanyadargin@gmail.com
Halima Lila: halimalila l@gmail.com
Jennifer Amadi: jen.amadi@gmail.com
Wawira Nyagah: wnyahln@gmail.com

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Today’s Agenda

Agenda

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Thought Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanzania</td>
<td>Halima Lila</td>
</tr>
<tr>
<td>India</td>
<td>Tanya Mahajan</td>
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<tr>
<td>Nigeria</td>
<td>Jennifer Amadi</td>
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<tr>
<td>Kenya</td>
<td>Wawira Nyagah</td>
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II.I Topline Findings
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.

References: (1) FSG; (2) PSI (3) Rossouw et al.
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.
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.

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
## Upstream Business Models: Brand Owners

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

<table>
<thead>
<tr>
<th>Business Model</th>
<th>Product type(s)</th>
<th>Primary Functions</th>
<th>Description / Examples</th>
</tr>
</thead>
</table>
| **Direct-to-consumer**              | All             | Distribution bypassing traditional retail outlets, Sales, (some) Marketing, and Education | • 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 | • 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

Manufacturers

- MNC
  - International (some regional) production
  - e.g., P&G, J&J, KC, some Chinese brands

- Mid-tier manufacturers and importers
  - Some in-house in-country manufacturing
  - Some white label importation

- Social Enterprise
  - Manufacturing may be contracted, white-labeled or in-house (e.g., AFRIPads, BeGirl)

- Cottage Industry
  - Small scale sub-national production through micro-enterprises, CBOs, and/or self-help groups

Importers

- FMCG & Pharmaceutical Importers / Distributors

Distributors/ Wholesalers

- Urban Pharma Wholesalers & sub-wholesalers
- Urban FMCG Wholesalers & sub-wholesalers

Retailers

- Dukkas / Stalls
- Drug Shops
- Pharmacies
- Chain markets
- Private hospital/clinics

Menstruators

- Out of pocket purchase
- Direct-to-consumer models (e-commerce models, community agents, vending machines)
- Flow of product
  - Commercial Sector
  - Public Sector

Govt, UN, NGO & CBO procurement (from all manufacturers)

Institutions (schools, universities, NGOs)

Community Dist. / CBOs

Free or subsidized distribution

Non-traditional outlets
II.III. Core Market Function Analysis
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**.
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.
MH products, particularly reusable products, remain unaffordable to menstruators in lowest income brackets.

Raw materials and distribution drive costs, with import duties and manufacturing equipment high for some contexts/product types.

Cash-constrained menstruators may prefer to buy smaller packages.

RRPs for MH products are rarely adhered to by retailers.

When taxes and/or duties on MH products are removed or reduced, result is not always a reduction in retail price.
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.
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
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**

<table>
<thead>
<tr>
<th>Recommended Interventions</th>
<th>Potential Funder</th>
<th>Recipient / Implementer of Funding</th>
<th>Beneficiary Business Model</th>
</tr>
</thead>
</table>
| Develop product standards and their fair and effective enforcement | • Governments  
  • Traditional funders                                      | • Governments  
  Market Facilitators / Intermediaries                  | • Cottage industry manufacturers  
  • Social Enterprises  
  • Mid-tier manufacturers  
  • MNCs                                                   |
| Incentivize the design of innovative products                 | • Traditional funders  
  • Market actor self-investment  
  • Innovative blended finance mechanisms                    | • Social Enterprises  
  • Mid-tier manufacturers                                     | • SEs  
  • Mid-tier manufacturers                                      |
| Ensure menstruators are aware of and have access to full product choice | • Traditional funders  
  • Innovative blended finance mechanisms                      | • NGOs/SMOs  
  • Governments  
  • Market facilitators/intermediaries  
  • Distributors                                                 | • All business models                                           |
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 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
# MH Market Maturity Spectrum Rapid Assessment Tool

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

*Assessment Options:*  
- Not yet present / Not enough information  
- Emergent  
- Expanding  
- Advanced
The MH Market Intervention Framework

- **Market Maturity**
  - Less Mature
  - Emergent
  - Expanding
  - Advanced
  - More Mature

- **Market Functions**
  - Manufacturers
  - Importers
  - Distributors / Wholesalers
  - Retailers

- **Support targeted free/subsidized distribution**
- **Stigma reduction**
- **Coordination & coalition building**
The MH Market Intervention Framework

Market Maturity

- Less Mature
  - Coordination & coalition building
  - Stigma reduction

- Emergent
- Expanding
- Advanced
- More Mature

Market Functions

- Manufacturers
- Importers
- Distributors / Wholesalers
- Retailers

Support targeted free/subsidized distribution
Explore non-traditional distribution approaches
Fair enforcement of product standards
The MH Market Intervention Framework

Market Maturity

- Less Mature
  - Coordination & coalition building
  - Stigma reduction
- Emergent
  - Fair enforcement of product standards
- Expanding
- Advanced
- More Mature

Market Functions

- Manufacturers
  - New product innovation
- Importers
  - Manufacturing investments for scale, quality, sustainability
- Distributors / Wholesalers
  - Support targeted free/subsidized distribution
- Retailers
  - Explore non-traditional distribution approaches
The MH Market Intervention Framework

Market Maturity

Less Mature
- Coordination & coalition building
- Stigma reduction
- Fair enforcement of product standards
- Advocate / adopt favorable tax policies
- Support local manufacturing

Emergent
- Strengthen local brand owners through innovative financing and technical assistance
- Support new product / brand entry
- Support supply chain management efficiency
- Explore non-traditional distribution approaches
- Leverage market-wide distribution innovations, e.g., e-commerce

Expanding

Advanced
- Manufacturing investments for scale, quality, sustainability

More Mature
- New product innovation

Market Functions
- Manufacturers
- Importers
- Distributors / Wholesalers
- Retailers
V. Panel Discussion
Local Mid-tier Manufacturer: Kay’s Hygiene Products, Ltd.

Presented by:

Halima Lila

Tanzania
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
Barriers to product entry: Registration and taxes

Presented by:

Jennifer Amadi

Nigeria
Questions?

Coming soon!

Final report on RHSC website
www.rhsupplies.org
THANK YOU!