

ENSURING ACCESS TO MENSTRUAL HEALTH SUPPLIES

RHSC's menstrual health access report



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Earlier this year, the [Reproductive Health Supplies Coalition \(RHSC\)](#) and [Mann Global Health](#) published “[Landscaping Supply Side Factors to Menstrual Health Access](#).” The report summarizes findings on the main barriers to, and opportunities for, menstrual health product access. This post breaks down the key findings and recommendations in the report. It talks about ways that donors, governments, and others can ensure access to menstrual health supplies for all who need them.

Key Terms

- **MH products** refers to commercially made:
 - Disposable pads.
 - Tampons.
 - Reusable pads.
 - Menstrual cups.
- **Menstruator** is a gender-inclusive term to denote anyone who uses MH products.
- **Last mile** is a term that refers to getting supplies to a community-based outlet (whether a clinic, store, or other location), and then into the hands of clients.
- **Upstream** refers to the production of supplies, while **downstream** refers to distribution of supplies.

What You Need to Know

- **Unmet need for menstrual health (MH) supplies persists.** MH is fundamental to sexual and reproductive health (SRH), but over 500 million menstruators worldwide still cannot access safe, quality, and affordable menstrual health products.
- **There is limited funding for MH.** Unlike other reproductive health supplies, menstrual care products are usually purchased individually by consumers through commercial retailers, rather being procured in bulk by donors and governments and provided at medical outlets.
- **Key stakeholders—including donors, governments, and advocates—need more information about MH supplies.** In order to determine the best way to provide MH supplies to clients, it is important to understand the factors that affect the MH supply chain

(including things like product manufacturing and distribution) and to analyze the MH market as a whole.

- **We can work together to meet the needs of menstruators, particularly those at the “last mile.”** There is a great opportunity for donors, governments, and non-governmental programs to expand their SRH programs to ensure access to menstrual health supplies at community-based health outlets.



Credit: Jonathan Torgovnik/Getty Images/Images of Empowerment.

RHSC and Mann Global Health conducted a mapping study. It looked at:

- The ecosystem that links menstruators’ access to menstrual health supplies.
- Different patterns of product flow (including manufacturing, imports, and distribution).
- Different commercial considerations (for example, how many MH supplies are purchased by users).

They selected four countries for deep dives into the MH market: Kenya, Tanzania, Nigeria, and India.

They conducted a literature review and key informant interviews with 20 individuals, focused on constraints related to supply (provision of MH products) and access (ability to obtain these products). In doing this, they identified constraints that affected menstruators' access to quality menstrual health supplies. The resulting report is intended to inform programmatic decisions for MH supply interventions, which reflect current trends and needs for MH supplies.

MH Market Trends

More than 500 million menstruators globally lack access to the necessary supplies to manage their menstruation. This is equal to one-fourth of the global female population of reproductive age.

The MH market is growing rapidly and has huge potential for future growth. For example, according to a [report by Population Services International](#), sales volume of MH supplies in India is doubling every five years. Still, supplies are still only reaching about 10% of those who need them.

Urban, wealthy, and educated are most likely to use commercial MH products.

Key Findings

Most Menstruators Cannot Obtain MH Products

This is because of one or more of the following reasons:

- **Affordability (they do not have the money to purchase them).**
- **Access (the products are not available).**
- **Awareness (they do not know the products are available).**

This leads to limited use of commercial MH products.

Manufacturing MH Products Is Challenging

It is expensive to maintain the equipment to produce mass quantities of MH products, and the raw materials are challenging to obtain.

Various Supply Chain Issues Lead to Limited Availability of MH Products

Things like inefficient distribution, poor infrastructure, and the sheer space needed to transport bulky MH supplies are all challenges for the MH [supply chain](#). Limited supply can also lead to higher retail prices for end-users purchasing MH products.

Lack of Awareness of MH Products Limits Demand and, thus, Supply

There is a general lack of awareness about different types, brands, and quality of MH products. Retailers will not carry what is not in demand by consumers. There is a general need for more consumer education around MH products—particularly for reusable options and less well-known options (like washable pads, period underwear, and menstrual cups)—to make sure menstruators are aware of their options, pros and cons, and how to use them.

Challenges with Current Products Limit Use

Ideal MH products are easy to use and clean, high-quality, environmentally sustainable, affordable, and acceptable. Current options meet some, but not all of these criteria. More research is needed to better understand consumer preferences and develop new and/or improved products that better satisfy the needs of menstruators.

Social Enterprises—or Businesses That Have a Strong Commitment to Social Change—Are Becoming More Common in the Area of MH Supplies

However, they often operate on a small scale and face challenges regarding sustainability.

Distribution Innovations (Vending Machines and E-Commerce) Are Promising as a Way to Increase Access to Menstrual Health Supplies

However, they require additional evaluation before promoting widely.

Choice Matters

Like contraception, ensuring that the availability of a wider informed product choice is critical. Menstruators benefit by choosing among a range of options that allow for mixed use and better meet their needs.

“Mixed use” refers to using different types of MH products on different days—and during different seasons—of an individual’s menstrual cycle. For example, using disposable pads some days, and menstrual cups or reusable pads on other days. Also, reusable cloth or period underwear can be difficult to fully dry in rainy seasons, so alternatives are needed.



Credit: Jonathan Torgovnik/Getty Images/Images of Empowerment.

Business Models and Market Structure

This report provided analysis regarding different business models—both upstream and downstream—and what type of MH products they supply. (Note that “upstream” here refers to the production of MH supplies, while “downstream” refers to distribution of MH supplies.)

They examined the following four upstream business models that were common across settings:

- Cottage industry manufacturers (businesses in people’s homes).
- Social enterprises (businesses that have a strong commitment to social change).
- Mid-tier manufacturers and importers (local manufacturers and importers of generic, or white-label, products).

- Multinational corporations (centralized companies with large marketing budgets, for example, Johnson & Johnson).

In terms of “downstream” business models, the analysis focused on last mile distribution. Specifically, they looked at direct-to-consumer models (for example, vending machines) and institutional free/subsidized distribution (for example, through programs in schools or in humanitarian settings).

The following are summaries of business models and product flow from the four focus countries in the report (click to expand):

Kenya

- **Market dominated by disposable pads from large global brands (Always and Kotex)**
- **Mid-tier importers and manufacturers (mostly from China) have a small but growing market share. Local manufacturing is limited due to high production costs.**
- **Social enterprise models are challenging due to limited funding.**
- **Several brands of reusable products (reusable pads and menstrual cups) are available, but have limited distribution as they await product registration.**

Tanzania

- **The largest MH market share is held by Freestyle, a locally-owned disposable pad brand that imports from China.**
- **There is also one local manufacturer of disposable pads (Kays Hygiene Limited), plus several mid-tier importers, and multinational brands (Always and Kotex).**
- **Menstrual cups have been introduced recently—one locally-owned company sells cups imported from China, and Lunette also is beginning sales in the country.**
- **Reusable pad sales are limited, and mostly are from cottage industries.**

Nigeria

- **Disposable pads dominate the market, specifically the brand Always.**
- **Local mid-tier manufacturers (for example, LadyCare) and Chinese brands (for example, Longrich, Norland) are growing in popularity.**
- **Several brands of menstrual cups and reusable pads are available, but it is difficult to get these products registered.**

- NGOs and social enterprises are increasingly supporting MH product distribution, especially in response to localized security challenges. In some cases, these distribution programs are partnering with local cottage industry manufacturers of reusable pads.
- There is more competition in the MH market than in other countries.

India

- The market is dominated by multinational corporations that produce disposable pads (for example, Procter & Gamble, Johnson & Johnson, Unicharm).
- Local mid-tier brands focused on urban and periurban markets are growing.
- Many disposable pad manufacturers are located in India, but tax policy gives importers an advantage over local manufacturers.
- Numerous reusable pad and menstrual cup brands exist, but still represent only a small portion of the market share.
- Some product innovation is occurring, including the development of compostable products and the use of locally-sourced raw materials.
- There is cottage industry manufacturing of disposable pads in India, unlike the other countries.

The report analyzed the MH market in terms of products, access, price, and demand.

Products: Overall, disposable pads are the dominant commercial MH product, with global brands providing most of the supplies. Reusable products (for example, menstrual cups) are beginning to gain traction, but knowledge about these products remains low. Furthermore, more MH brands are coming on the market, but not all are high-quality.

Access: MH products are broadly accessible at retail outlets in urban areas. However, availability is limited in rural settings, particularly for reusable products. Retail prices are often high. Innovative outlets (for example, direct-to-consumer platforms like vending machines or eCommerce models) are promising, but they have mixed results. Free or subsidized provision of MH

products—particularly in schools—is an important distribution route in many settings.

Price: Commercial MH products—especially reusable ones—remain too expensive for those in the lowest income brackets. Even when taxes and duties are removed on products, retail prices do not always come down. Many low-income menstruators prefer buying smaller quantities of products.

Demand: Lack of education and awareness about MH products is a big challenge. Many suppliers combine product promotion with school-based education about puberty and menstruation. Brands often target urban middle- and high-income communities. Misleading marketing claims are prolific (for example, claims that certain brands can relieve menstrual cramps). Further, stigmas and taboos associated with discussing menstruation are challenging for the MH market in most settings.

Cross-cutting Findings: Advocacy and coordination is important to ensure access to menstrual health products. Product quality standards are becoming more common. This is beneficial for consumers but can also allow for new product types to enter the market. Most donors have little interest in funding MH supplies. However, there is a strong commercial potential, which is attracting interest from innovative groups (for example, e-commerce groups and advocates for reusable products).

Note: This is a highly summarized version of the section on business models and market structure. See the [full report](#) for additional information. The report also includes a helpful tool—the MH Market Intervention Framework—to help improve provision of MH supplies.

Key Recommendations

The assessment led to four overarching recommendations for donors, governments, program managers, and others:

1. Support Product Choice, Which Promotes Use

Ensuring that menstruators are aware of, and have access to, a full range of MH products is the first step to ensure product choice. Continued investments—by donors and governments—to develop and apply product quality standards can help ensure availability of a wider range of products. These investments can also encourage the design of innovative products and product improvements to reach more menstruators. Such innovations can be as simple as offering packages with smaller quantities of products that are more affordable to lower-income menstruators.

2. Support Market Actors to Grow Scalable, Sustainable Businesses

Investing in national or regional producers of MH products is a way to help ensure sustainability of MH products. From equipment to changes in tax policy, to technical assistance, there are a number of actions governments and larger companies can take to support more sustainable MH provision that reaches the last mile.

3. Improve Distribution to Allow for Greater Access and Affordability

Support for innovative distribution models, like e-commerce and vending machines, can help improve access. And improvements to the supply chain overall can help keep costs lower for consumers. Free and subsidized distribution programs are still needed—for example, those providing MH products in schools.

4. Support Awareness Building, Demand Generation, and the Evidence to Inform Future Work

Advocacy to improve promotion of MH products is important, in addition to stigma reduction programs, so more menstruators can discuss their needs more openly. This will lead to greater awareness, demand, and acceptability of MH products. More evaluation and data collection is also needed to inform future MH programs.



Credit: Paula Bronstein/Getty Images/Images of Empowerment.

Looking Ahead

Increasing access to menstrual health supplies can change menstruators in a number of ways—from increased educational opportunities to greater gender equality and reduction in stigma. Program managers, policymakers, donors, and others can follow the above recommendations to include MH in SRH programs, therefore improving the supply chain and ensuring greater access to menstrual health supplies for all who need them.

Want to learn more about this topic? Further reading: Laura Amaya, Jaclyn Marcatili, Neeraja Bhavaraju, [Advancing Gender Equity by Improving Menstrual Health: Opportunities in Menstrual Health and Hygiene](#) (FSG, April 2020).

***The Reproductive Health Supplies Coalition** is a global partnership of public, private, and non-governmental organizations dedicated to ensuring that all people in low- and middle-income countries can access and use affordable, high-quality supplies to ensure their better reproductive health. The Coalition brings together diverse agencies and groups with critical roles in providing contraceptives and other reproductive health supplies. These include multilateral and bilateral organizations, private foundations, governments, civil society, and private-sector representatives.*