

MARKET LANDSCAPING OF MENSTRUAL HEALTH AND HYGIENE MANAGEMENT PRODUCTS-NEPAL

BACKGROUND

Many adolescent girls in Nepal lack hygienic sanitary materials and disposal options, access to a private place to change sanitary cloth or pads and clean water to wash their hands, bodies, and (if used) reusable sanitary products. This study focuses on the supply side aspects of Menstrual Health and Hygiene Management (MHM) products in terms of the market size of the various MHM products, key players, distribution channels, sales values and pricing of the various MHM products in order to understand the market and the possible solutions to remove the supply gaps in ensuring safe menstrual hygiene.

METHODOLOGY

A two pronged approach was used to provide an overall view of the MHM market in Nepal. The first was the usage of retail measurement data for sanitary pads which is a syndicated data collected for sanitary pads in urban Nepal market by Nielsen. The information on the other MHM products like panty liners, menstrual cups and tampons was gathered from discussions with various stakeholders engaged in MHM in Nepal. The second approach was qualitative in nature and assessed key market constraints from the perspective of the existing manufacturers, importers, the distribution channel as well as non-government organisations (NGO) engaged in the provision of MHM products and services in Nepal.

KEY FINDINGS

Sanitary Pads

- The urban volume in terms of units of sanitary pads sold in Nepal urban market was 91 million pads annually representing about 60-65% of the total market.
- The hospitals and health posts account for 7 million pads (approx. 5%), large departmental stores account for 14 to 15 million pads while rural areas account for about 30 million pads (20-25%).
- Altogether, 140-150 million pads were sold in Nepal through various distributors and retailers. Everyday approximately 290,000 women and girls

menstruate in Nepal. Hence, the total volume was far below what would be required to reach millions of women and adolescent girls in need for MHM products every month.

- The issue was not limited to supply but also to the subdued demand for such products owing to low awareness and financial constraints.
- Standard guidelines in product specifications such as materials used, specified sizes, manufacturing specification and absorption requirements, disposability, pH values were unavailable in Nepal.
- Local manufacturers were unable to compete with international brands due to high tariffs on importing materials. Sanitary pads were not considered pharmaceutical items and hence the import duties were higher than pharmaceutical items.

Menstrual Cups

- The target consumers were usually age group of 20 years and above, specially those women who were aware of the product or were willing to use new products and take informed decisions.
- The information and awareness was limited to affluent sections of the society and among women who were aware of menstrual products and could afford buying the same.
- In relation to cup size, usually the focus was more on the normal cup size as the women who were willing to experiment were usually those who were aware of their menstruation and reproductive health usually after pregnancy.

Tampons

- The presence of Tampons and their availability could not be observed in the traditional channels although a few Chemists did report occasional stock holding.



Reusable Cloth Pads

The sale of reusable MHM products like reusable cloth pads was an affordable option which also addressed the issues of disposal, and was promoted by various NGO initiatives. Reusable pads were sold by women trained in making these pads under various NGO programs as an income generating activity. Many community based organizations (CBOs) which had entered into production of reusable cloth pad were localized businesses with a catchment area in and around the shops where these pads were made. They had no marketing support other than selling to women's /mothers' groups and schools in rural areas.

From the supply perspective, the market needs to be segmented based on demographic, geographic, psychographic, and behavioral approaches towards MHM products. At present the marketers have their own basis of segmentation based on the purchasing power of consumers and feedbacks from their retail and sales partners. Investments on MHM market development are limited to large companies who promote their brands, but do not invest on raising consumers' awareness on menstrual hygiene. Therefore, the options available to consumers, especially at the bottom of the pyramid, are limited. In order to produce affordable as well as commercially viable MHM products, incentives to manufacturers either in the form of reducing import costs, production of pads in Nepal and tie ups with the Government to promote the same is required. There were many products in the market which did not meet the quality standards owing to the lack of any regulatory

framework for standards of sanitary pads in Nepal. Therefore, the Nepal standards must be documented, notified and implemented in order to avoid low quality products in the market. As multiple agencies were working on localized solutions trying to provide a local livelihood, the challenge was to expand the reach and convert the total market through massive investments in awareness supplemented by product innovations. The MHM market players would require going beyond serving the commercial interests alone, and ensuring reach at price points acceptable to consumers.

STUDY LIMITATIONS

- Out of five, only two local manufacturers and one of the importers could be interviewed for the study. Relevant details of the remaining two brands had to be gathered from the distributors and retailers and informal discussions due to refusals.
- There were no manufacturers of menstrual cups, panty liners and tampons in Nepal and hence the information regarding the marketing constraints faced by the other MHM products could only be inferred from the retail and trade partners.
- Reusable pads were produced by local entrepreneurs and CBOs supported by international agencies, however their penetration in the formal trade was still in its early stages and could not be ascertained from the trade channels.

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