



Increasing Access to Menstrual Hygiene Management Products in Ethiopia

13 September 2018



Objectives

- Provide brief context for the project
- Give an overview of the project's methodology
- Discuss key findings and some potential solutions under consideration in Ethiopia
- Share our next steps and any questions

An Opportunity to Address Menstrual Health and Gender Equity

- Menstruation is a monthly challenge for billions of women and girls worldwide. On any given day, more than 300 million girls are menstruating¹
- Qualitative research suggests that girls experience shame, embarrassment, and discomfort during menstruation because they lack access to affordable and preferred products, private and safe facilities, and education about menstruation and how to manage it²
- Evidence about the impact of poor menstrual health on other health, development, and empowerment outcomes is scant, not statistically significant, and largely inconclusive

¹The Lancet Child & Adolescent Health. Normalising menstruation, empowering girls. Lancet Child Adolesc Heal 2018; 2: 379.

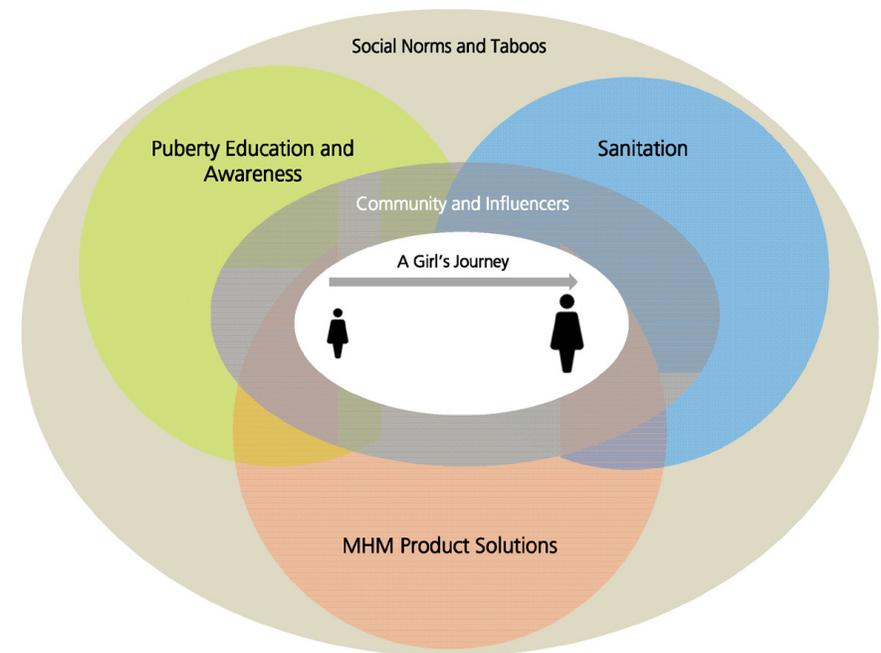
²FSG. "An Opportunity to Address Menstrual Health and Gender Equity". May 2016.

Menstrual hygiene interventions involve a number of critical components²

Critical components of a menstrual health intervention include:

1. access to knowledge,
2. **access to products,**
3. access to WSH services, and
4. improved social norms

FIGURE 1: MENSTRUAL HEALTH FRAMEWORK²



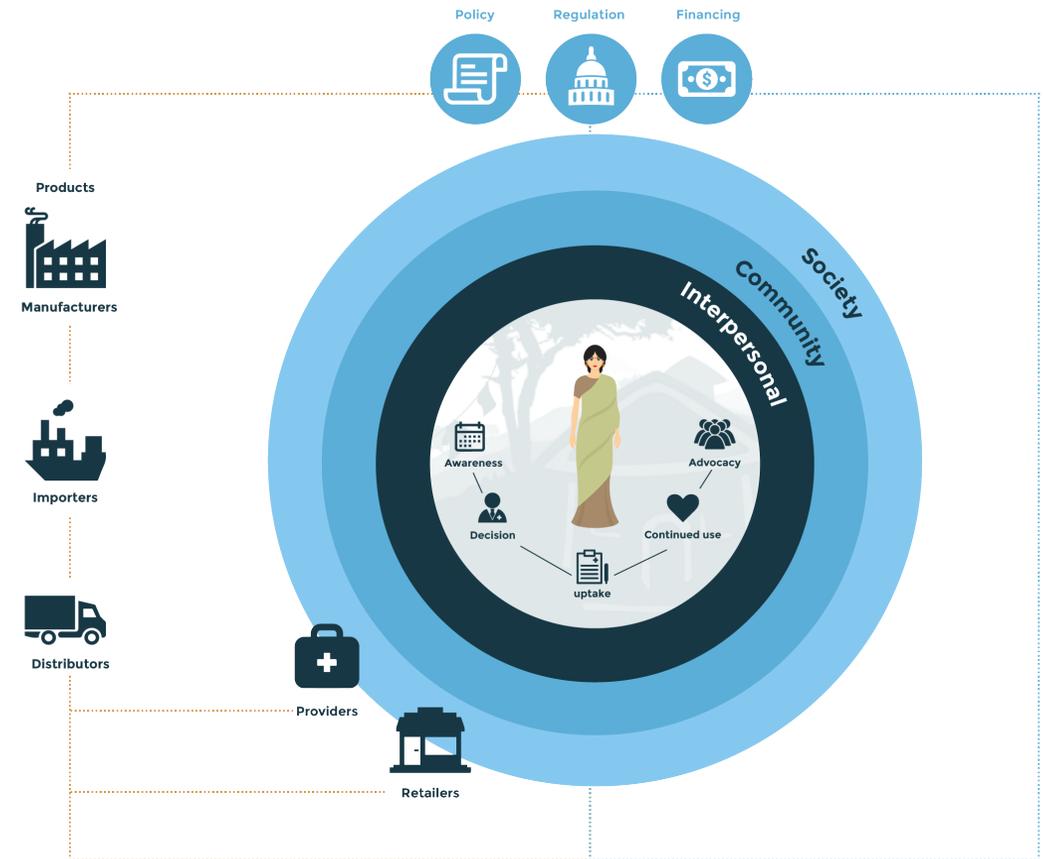
²Source: FSG. "An Opportunity to Address Menstrual Health and Gender Equity". May 2016.

Build an understanding of the market

Project scope

- Motivators and barriers to using homemade and commercial products
- Identify girls that are not accessing commercial products
- Preferred products attributes, means of access, and pricing trade-offs
- Understand supply constraints
- Identify potential opportunities to increase access to preferred products

Figure 2: PSI's Approach to Market Development



Four primary sources of information



Qualitative
Research



Quantitative
Research



Stakeholder
interviews



Solution
workshops

Figure 3: Research locations



Ethiopia research expanded to cover rural locations Yetnora and Goha-Tsihon

A focus on Ethiopia

Key findings



Why are girls using commercial products?

86%

of adolescent girls in urban areas report use of sanitary pads

49%

of adolescent girls in non-pastoralist rural areas report use of sanitary pads

*Ethiopia PMA 2020

We asked them.



1. Fear of stains

2. Increased mobility

“

The use of “cloth at school [is] difficult because I [am] scared of leaks.”

“Cloth is comfortable but doesn’t stick. Pad sticks to panties and feels safe, no stains.

“...Use improvised product when I stay at home or out for short while. Otherwise if I go out always use pad to make myself free of any worry of staining and falling down.”

“School, dance class, church, use pad; only use cloth at home.”

“When I compare sanitary pads with cloth it’s incomparable. I continue using improvised products because I have no [other] option.”

“If we had enough money we would never buy the cloth. We have other priorities than this.”

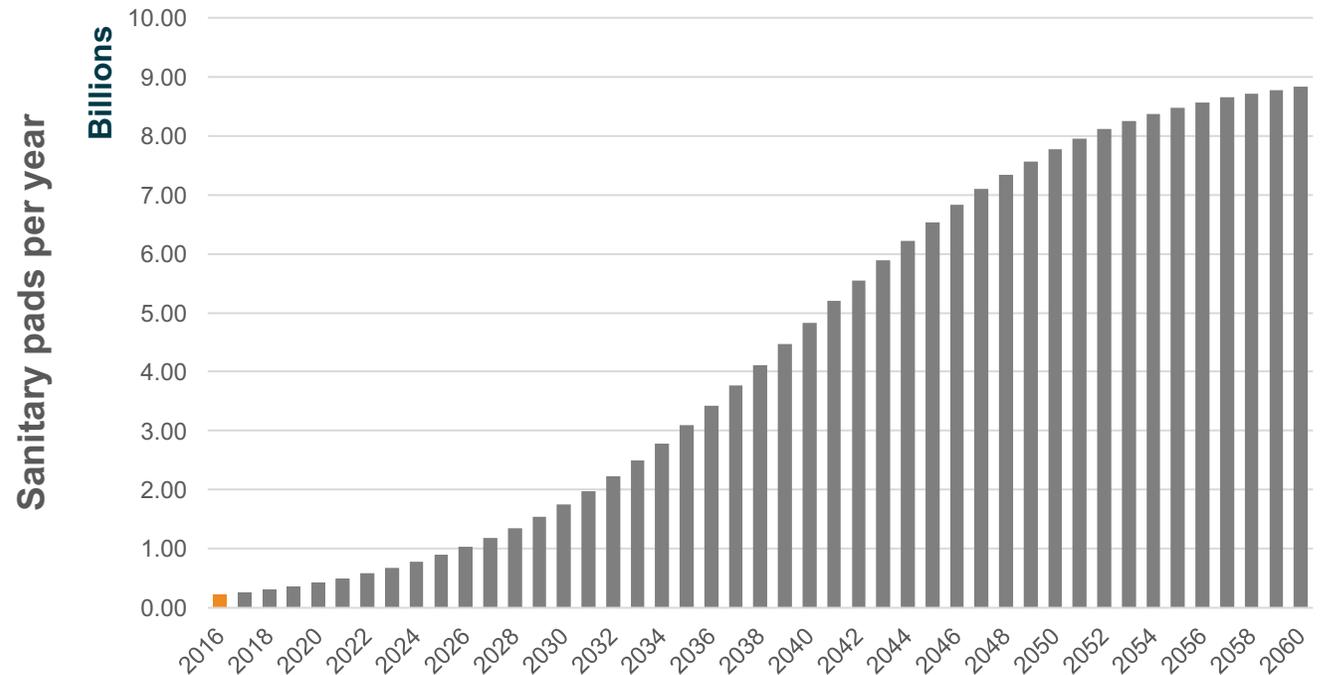
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MHM commercial market is relatively nascent...

- Undifferentiated market dominated by 2 sanitary pads (90% of 230 million pads)
- Potential to grow to 7-9 billion pads



Ethiopia MHM potential market size estimation



... and highly constrained from developing at this time..

- Rural need/ urban supply
- Market functioning and development is severely hindered by macroeconomic conditions



Heavy reliance on imported goods



Lack of access to foreign currency



Declining currency value



CONSUMER JOURNEY

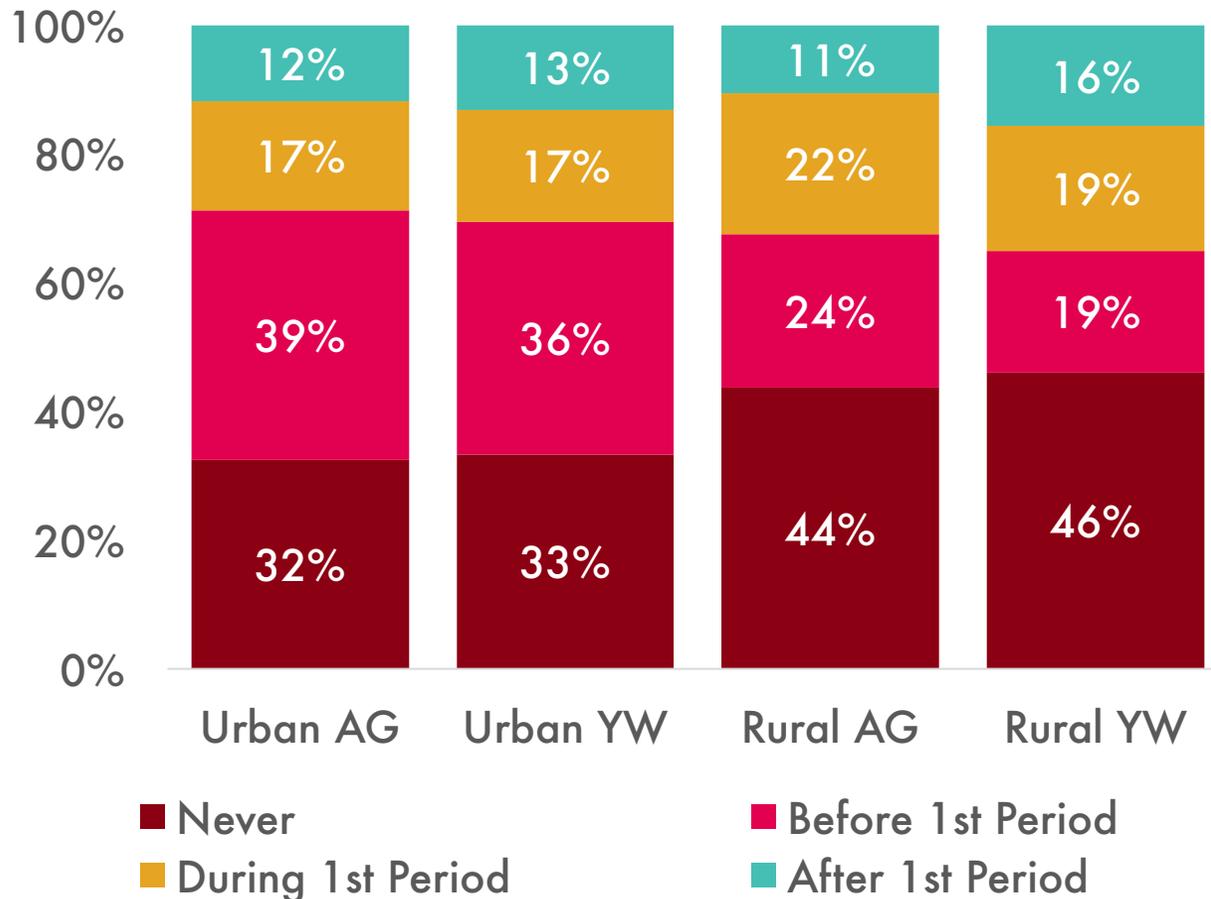


CONSUMER JOURNEY



Menstruation seen as taboo, associated with sexual activity, and not frequently discussed.

When Did You First Discuss Menstruation?



“Met a girl who was crying. She was menstruating but afraid to tell mother because she would think she had intercourse.” -Ethiopia

- “There was a girl in community whose period came at 11. This was not seen as normal by the community.” –Ethiopia

52% of adolescent girls never received information about MHM.

*UNICEF KAP Study 2016

CONSUMER JOURNEY



AWARENESS



**ACCESS/
PURCHASE**

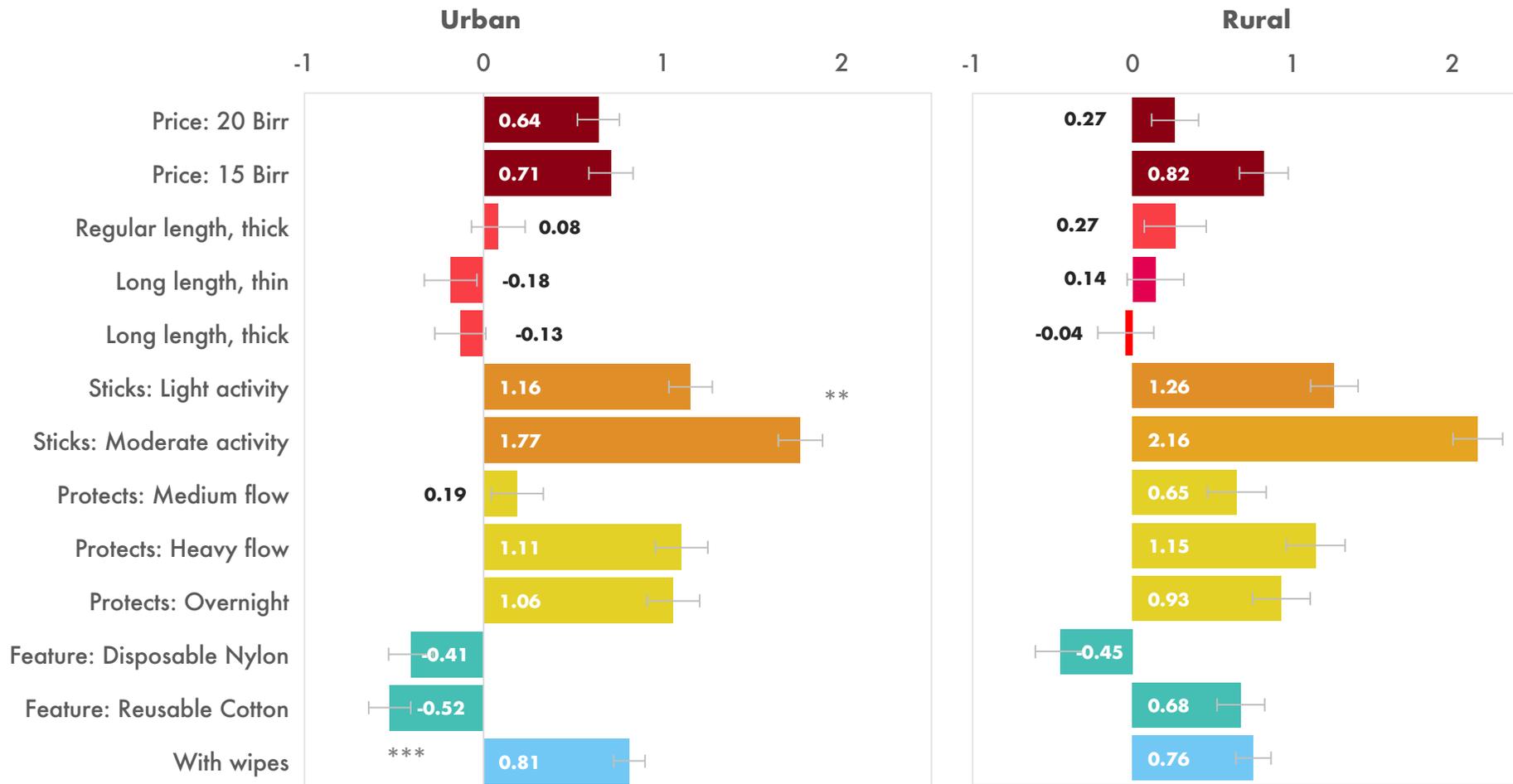


USE



DISPOSAL

All AGYW want higher quality MHM products.

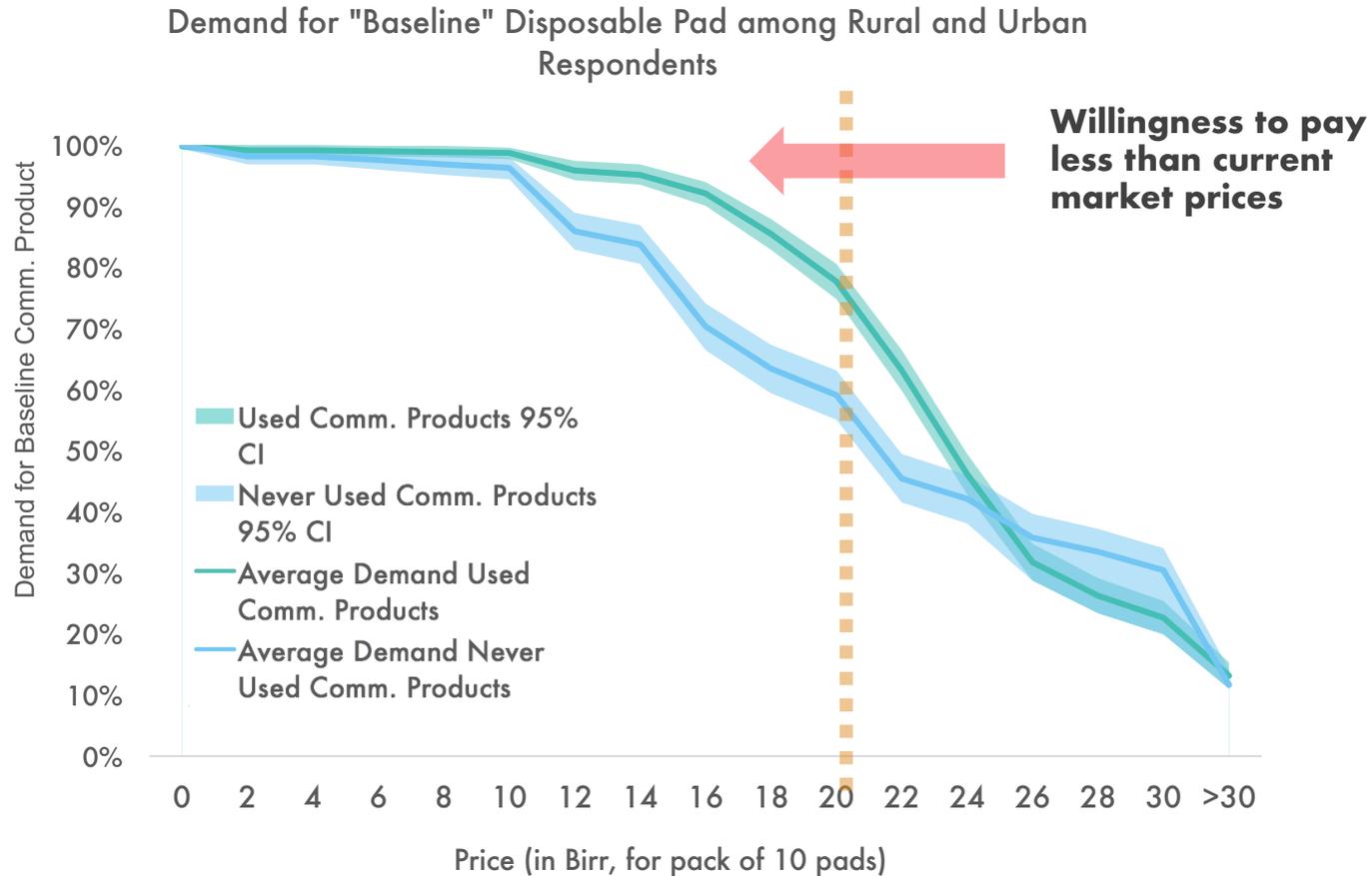


We thought price would be the most important factor, but it really wasn't:

- ▶ Stickiness
- ▶ Absorbency
- ▶ Wipes included
- ▶ Cost

Notable difference
 Urban: disposable
 Rural: reusable

Average willingness to pay is high, but affordability still a barrier for many AGYW

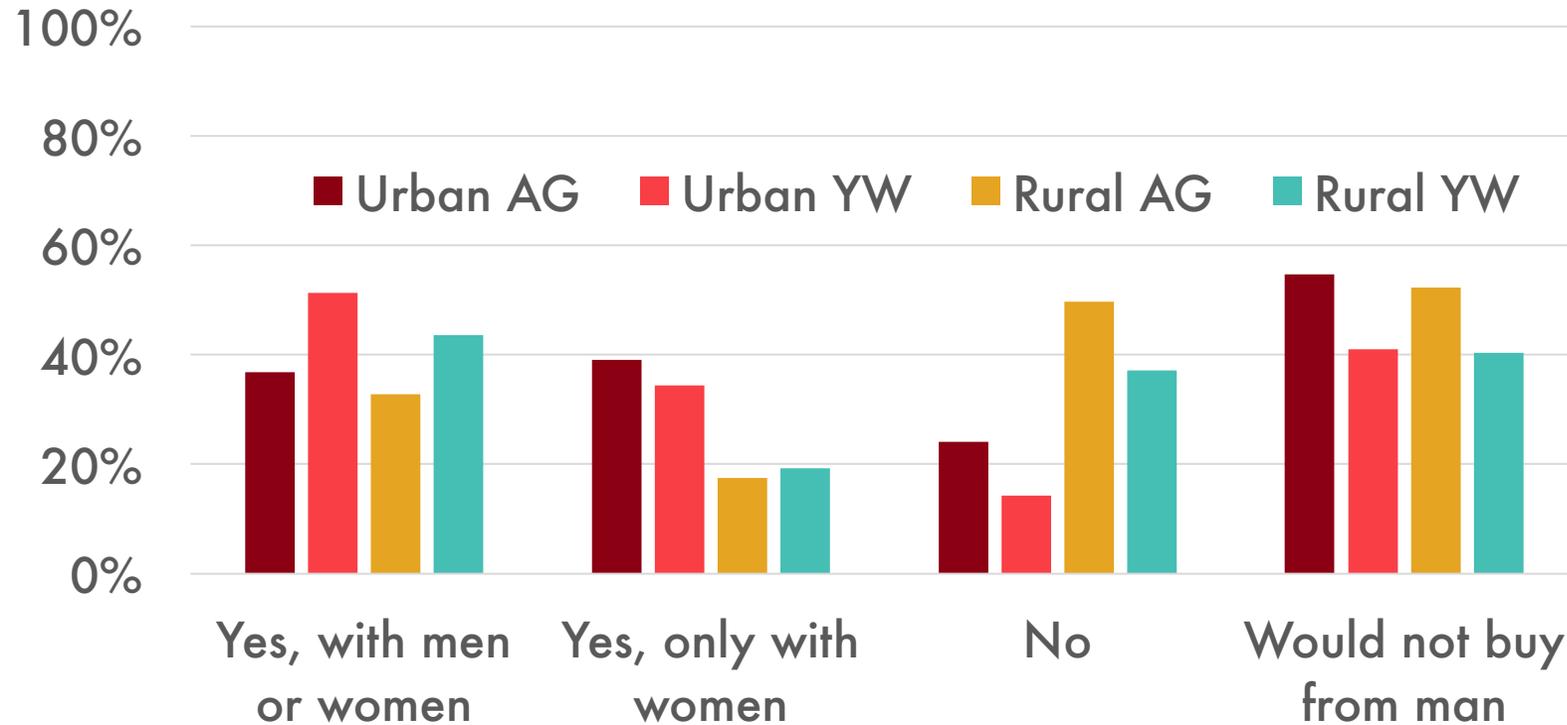


However

- ▶ 30% of respondents were not willing to pay 20 Birr (the average market price) for a pack of “typical” pads.
- ▶ Affordability was a barrier for a larger proportion of girls
 - ▶ From rural areas (41-49%)
 - ▶ In the lower wealth quintiles: (Quintile 1: 60%, Quintile 2: 41%, Quintile 3: 38%).
 - ▶ Who had never used a disposable product (36%)

Pad access is limited by inconsistent supply and social barriers to purchase products.

Would you buy MHM Products in a Crowded Shop, or from a Man?



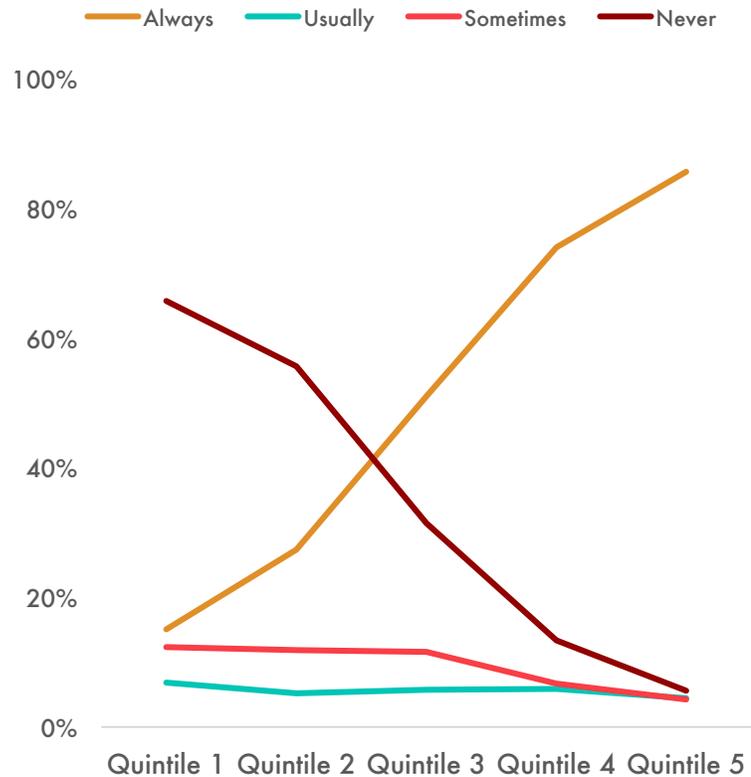
- ▶ High stock-out rates due to macroeconomic conditions
- ▶ Male harassment at site of purchase commonly reported
- ▶ Low prioritization in household expenditures

CONSUMER JOURNEY

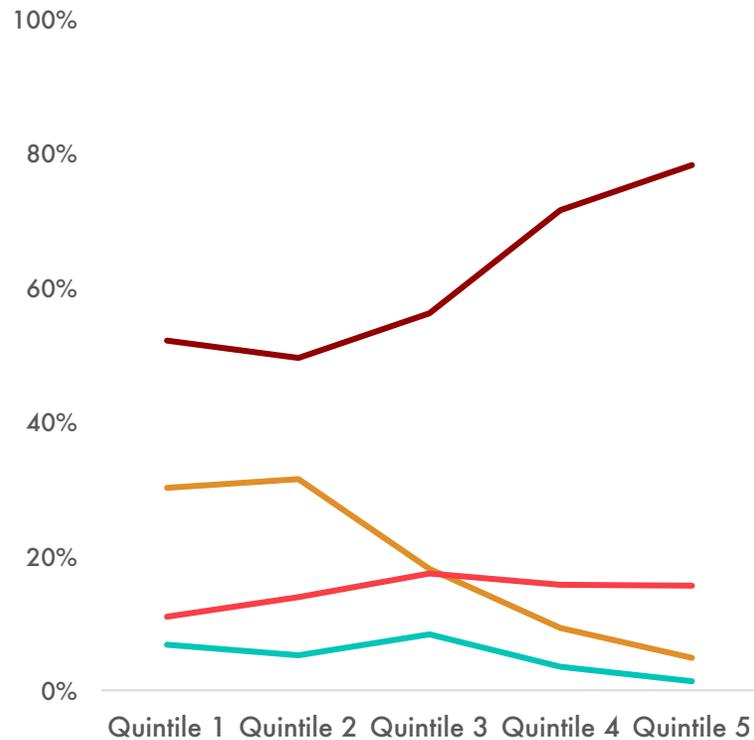


Mixed use strategy is common to counteract access barriers.

Disposable Pad Use at Home

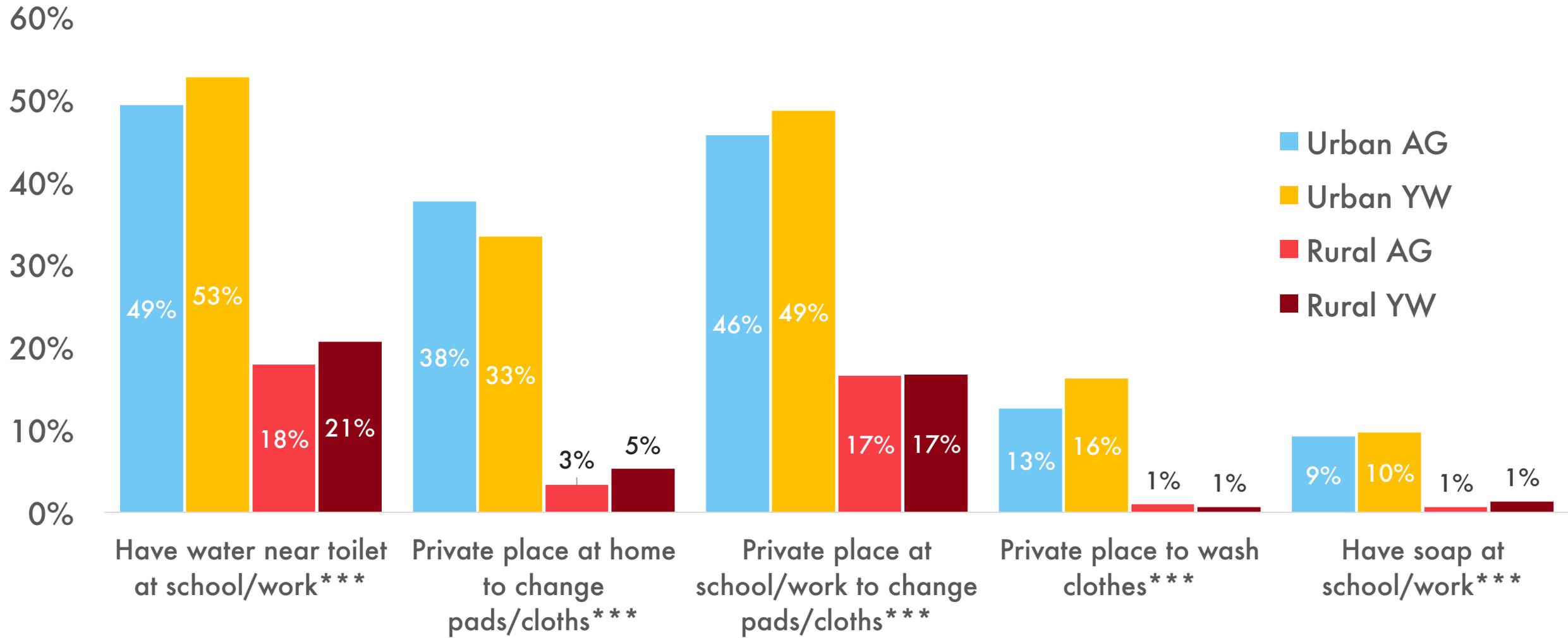


Cloth Use at Home



- AG/YW using homemade cloth solutions at home and saving commercial pads for use at school or work.
- Exclusive pad use was strongly correlated with wealth quintile

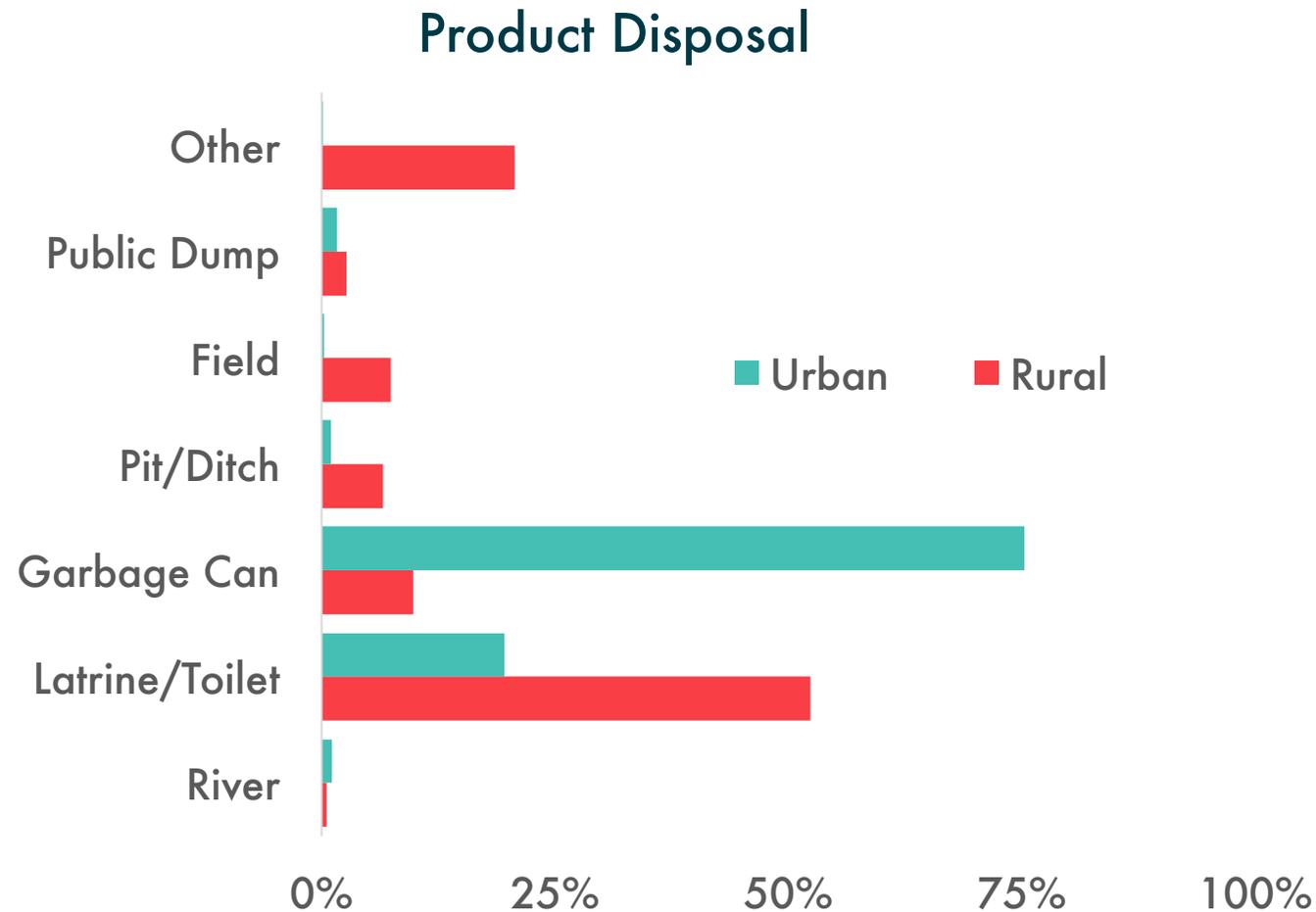
Low access to clean water and private spaces to wash and change pads is a deterrent to use.



CONSUMER JOURNEY



Disposal is a challenge, especially in rural areas.



- Currently few waste facilities support appropriate disposal and processing of MHM waste.

A focus on Ethiopia

Opportunities for consideration



Five Opportunities for Consideration

- 1. Include menstrual health within adolescent, sexual and reproductive health, and gender equity programs.**
- 2. Tip the calculus for rural markets.**
- 3. Give AGYW the products they want, from where they want to get them.**
- 4. Access is not enough. Support AGYW through their entire MHM journey.**
- 5. Facilitate coordination between commercial actors and the public sector.**

1 Include menstrual health within adolescent, sexual and reproductive health, and gender equity programs.

- Sexual and reproductive health programs take ownership of driving the menstrual health agenda and incorporate it as a key element in its strategy and programming.
- Invest in research to identify and optimize the linkages between menstrual health and funded development priorities such as family planning, gender equity, and adolescent health.

2 Tip the calculus for rural markets.

- Incentivize the use of locally sourced absorbents
- Pilot coordinated demand generation events with coordinated retail supply
- Invest in reusable pad programs with clear and sustainable business models.

3 Give AGYW the products they want, from where they want to get them.

- Include in all MHM programming.
- Advocate for finalization and implementation of Ethiopian Standards Agency minimum product standards
- Demonstrate business case for improved, differentiated product offering to current importers and manufacturers.
- For local manufacturers, additional research and support may be needed to understand what capitol investments in production or inputs may be needed to achieve the desired attributes.

4 Access is not enough. Support AGYW through their entire MHM journey.

- Integrate MHM considerations into SRH, gender, adolescent health programming tied to shaping education and social norm systems.
- All WASH programming should also plan for the likely increase in MHM waste.



5 Facilitate coordination between commercial actors and the public sector.

- Support the expansion of School Health Programs to make an aggregated pool for private actors to market their disposable and reusable products.
- Facilitate input and advocacy from private sector MHM product importers and manufacturers to government ministries and relevant technical working groups.
- Invest in the capacity of the technical working group to analyze and distribute the PMA2020 data sets

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Next Steps for PSI

1. Dissemination

- Ethiopia and India reports to be published this month
- Will be presenting three abstracts and hosting a side-event on the "Menstrual Hygiene Consumer Journey" at the UNC WASH conference
- Several articles submitted to peer-reviewed journals

2. Ethiopia

- Concept note submitted to Dutch Embassy to explore rural distribution models

3. Zimbabwe

- Team is landscaping the menstrual hygiene market with funding from SIDA. Will likely test menstrual cups through a variety of channels including targeting of influencers.

4. Menstrual Health Council

QUESTIONS AND DISCUSSION

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