<table>
<thead>
<tr>
<th>Product Attributes</th>
<th>Reusable Products</th>
<th>Compostable Products</th>
<th>Non-compostable Products</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cloth Pads /</td>
<td>Hybrid pads /</td>
<td>Disposable sanitary pads</td>
</tr>
<tr>
<td></td>
<td>without insert</td>
<td>non-cloth barrier</td>
<td></td>
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<tr>
<td></td>
<td>Memont cap</td>
<td>Tampons with</td>
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<td></td>
<td></td>
<td>cardboard applicator</td>
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<tr>
<td></td>
<td></td>
<td>Celulose based</td>
<td></td>
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<td></td>
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<td>sanitary pads /</td>
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<td>plastic barriers</td>
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<td>Celulose based panty</td>
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| Price Range (Rs.) | Rs. 8; 50/20-pad (Average Rs. 40) |
| Per cycle cost   | Rs. 55 (assuming use for one year) |
| Rs. 95 (assuming use for one year) |
| Rs. 100 (assuming use for one year) |

**Product Attributes**
- **MENSTRUAL HYGIENE PRODUCTS IN INDIA**

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- Rs. 8; 50/20-pad (Average Rs. 40)
- Rs. 55 (assuming use for one year)
- Rs. 95 (assuming use for one year)
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Sanitary pads - 23% in this segment

1. **India Fact Sheet**

Private sector players in rural India focus on disposable, non-compostable sanitary pads. However, the majority of products reaching urban and rural consumers are likely to be disposable, non-market, the majority of products reaching urban and rural consumers to be cognizant of a host of factors while choosing menstrual hygiene products.

However, the organized sector is estimated to have a much lower penetration of approximately 15 percent. The difference is presumably due to a significant increase in use of sanitary pads amongst the youth – 17.6 percent of girls in the age group of 15-24 are currently using locally or commercially produced sanitary pads.

This may be due to the focus on increasing adolescents’ access to sanitary pads through various Government run schemes in schools and Angawadi centers. There is also a large and growing self-help group driven manufacturing industry, which sells sanitisers for manufacturing disposable sanitary napkins. These locally made sanitary napkins are also facilitated by schemes from the Ministry of Women and Child Development, National Rural Livelihoods Mission and various State Governments. However, there is little data about the extent to which these products are contributing to the overall market. Hence, further research is necessary to understand the detailed factors behind this increase in access to products.

Given this concern, various social enterprises and public health organizations have introduced menstrual hygiene product innovations that have captured a miniscule share of the market within geographical clusters. Such innovations have minimal adverse impact on the environment in the long term and have potential to reach underserved communities. Unfortunately, currently their use is undermined by limited awareness and availability. This is due to cost of products being high owing to small scale and limited product awareness as they have not yet been introduced to a majority of women. The full life cycle costs of the majority of commercially available products has not been factored into decision-making. The collective challenge is to continue the work on increasing access to safe MH products while catalysing the industry in a direction that offers more sustainable products at scale.

**Over 1 BILLION non compostable sanitary pads are making their way to urban sewerage systems, and landfills, rural fields and water bodies in India every month.**

While this shows significant leaps in access to safe and hygienic products for MH, it also raises the issue of sustainable waste management of these products, once disposed as well as the overall sustainability of the schemes. Using the interactive waste loading model developed by PATH, it is estimated that over 1 billion non compostable sanitary pads are reaching their way to urban sewerage systems, and landfills and rural fields and water bodies in India every month.

Not only do these products take hundreds of years to decompose, but also because of the super absorbent polymer contained in commercial sanitary napkins, they absorb and retain thirty or more times their weight in fluid (Gupta, 2016). Given this concern, various social enterprises and public health organizations have introduced menstrual hygiene product innovations that have captured a miniscule share of the market within geographical clusters. Such innovations have minimal adverse impact on the environment in the long term and have potential to reach underserved communities. Unfortunately, currently their use is undermined by limited awareness and availability. This is due to cost of products being high owing to small scale and limited product awareness as they have not yet been introduced to a majority of women. The full life cycle costs of the majority of commercially available products has not been factored into decision-making. The collective challenge is to continue the work on increasing access to safe MH products while catalysing the industry in a direction that offers more sustainable products at scale.

**MENSTRUAL HYGIENE PRODUCT LANDSCAPE**

Given the importance of considering environmental impact as a key factor in the current scenario, the overall product landscape has been segregated into three broad categories:

<table>
<thead>
<tr>
<th>Menstrual hygiene products available in India defined by environmental impact:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reusables</strong> Products that can be used multiple times. Life span of 1-10 years resulting in minimal disposal impact. Hygienic use requires care and maintenance. One time cost maybe high but life cycle cost is usually lower.</td>
</tr>
<tr>
<td><strong>Compostable</strong> Disposables for compostable sanitary pads with high degree of compostable content. One time use and materials conducive to composting. Limited impact on disposal. Layers ensuring absorbent layer should have high degree of compostability. Limited players in India with only one product variant each. Currently higher cost than non-compostable.</td>
</tr>
<tr>
<td><strong>Non Compostable</strong> Disposables with minimal compostability. One time use with compostable absorbent layer typically sealed within non-compostable layers. Can take 250 years to fully decompose. Largest market share and reach in India with multiple players (BMIS, social enterprises, SNG units, Government network).</td>
</tr>
</tbody>
</table>

**PRODUCT CONSIDERATIONS ACROSS THE MMH VALUE CHAIN**

- **Awareness**
  - Myths and taboos
  - Menstrual hygiene as a human right
  - Need for safe, hygienic MH products
- **Access**
  - Cost to the consumer
  - Ease of access - physical reach
  - Point of retail should allow for choice - multiple products, brands
  - Can the women/girl contact us with queries or get information on product
- **Use**
  - Products should account for user consideration
    - Basic consumer needs - absorption, fluid retention, no wetness, no irritation
    - Aspirational needs
    - Societal barriers - vaginal insertion pre-marriage is discouraged
- **Waste Management**
  - How materials and ability to degrade frequency of disposal
  - Quantity of waste generated
  - Ease of segregation
  - Community systems for waste management suitable for product
  - Disposal site in sanitation facilities
  - Reusability for collection and disposal of menstrual hygiene waste

**MENSTRUAL HYGIENE PRODUCTS IN INDIA**

The image contains a table titled “Menstrual hygiene products available in India defined by environmental impact.” It categorizes products into three broad categories: Reusables, Compostable, and Non Compostable. Each category includes specific characteristics and considerations for users and stakeholders. The table provides a comprehensive overview of the menstrual hygiene landscape in India, addressing environmental implications and user needs.