MENSTRUAL HYGIENE PRODUCTS IN INDIA								
Product Attributes	Reusable Products			Compostable Products		Non-compostable Products		
	Cloth Pads w/ without insert	Hybrid pads w/ non cloth barrier	Menstrual cups	Compostable sanitary pads	Tampon with cardboard applicator	Cellulose based Sanitary pads w/plastic barriers	Cellulose based ultra thin pads w/ plastic barriers	Cellulose based panty liners
Price Range (Rs.)	Rs. 85-400/pad (Average Rs. 250)		Rs. 400-3,000/cup (Average Rs. 1100)	Rs. 8/pad	Rs. 8/tampon and above	Rs.2-6.5/pad (Average Rs. 4)	Rs. 7-12/pad (Average Rs. 9)	Rs. 4.5/liner and above
Per cycle cost to consumer	Rs. 19 (assuming use for one year)		Rs. 85 (assuming use for one year)	Rs. 96	Rs. 96 and above	Rs. 48	Rs. 108	*Not for use for regular/ heavy flow*
ENVIRONMENTAL IMPACT								
Reusable 🟢 Disposable ⚫	🟢	🟢	🟢	⚫	⚫	⚫	⚫	⚫
Compostable 🟢	🟢	◐	○	🟢	🟢	◐	○ *Additional SAP*	◐
USER PREFERENCES								
Low cost per purchase						🔵		
Basic needs	🔵	🔵	🔵	🔵	🔵	🔵	🔵	🔵
No maintenance				🔵	🔵	🔵	🔵	🔵
Intensive physical activity					🔵		🔵	🔵
Requires learnt behaviours			🔵		🔵		🔵	🔵
No chemicals/ plastics	🔵	🔵	🔵					
Low life cycle cost	🔵	🔵	🔵					
Policy						• SWM guidelines require appropriate disposal considerations • Regular sanitary pads procured for Govt. distribution • BIS standards for materials, size		
Awareness	Low income clusters and high income			Low	Low	Very high pan India	Very high in urban	Only urban high income
Availability	Low income clusters and online			Limited, two manufacturers	Medical stores in few urban high income clusters, online	Pan India Rural low income limit-ed till medical shops at district/block, Schools, AWW centers	Pan India urban and peri-urban, online	Medical stores in urban high income clusters, online
Manufacturer	Ecofemme, Goonj, Gramalaya, Shomota, Soch, Uger, Saafkins		She Cup, Silky Cup, Moon Cup, Luna Cup, VCup, ALX, Rustic art, stonesoup wings	Aakar (Anandi pads) Saathi Pads, Sakhi (Vatsalya), Wager Hygiene	Unicharm (Sofy), ob, Tampax, other imported brands	P&G (Whisper), J&J (Stayfree, Carefree), KCC (Kotex), Unicharm (Sofy), SHG based units like Vatsalya foundation, Sakhi retail etc.	P&G (Whisper), J&J (Stayfree), Saral Designs (Aisha), Wager Hygiene	J&J (Carefree), Unicharm (Sofy), other imported brands

Pushing the Boundaries
on the MHM Dialogue in India

Access and Use

2

MENSTRUAL HYGIENE **PRODUCTS** IN INDIA

The Evolving Landscape

Calls to **Action**

- Information on availability, user preferences, environmental impact and cost should inform
  - Product procurement for large scale Menstrual hygiene management programs
  - Product standards for the complete range of Menstrual Hygiene products
  - A comprehensive tax structure for raw materials and finished goods across the range of Menstrual Hygiene products
- Clarity on classification of menstrual hygiene products as consumer or medical goods to ensure communication of comprehensive information to consumer on product use and side effects
- Universal availability of menstrual hygiene products and appropriate water, sanitation, hygiene and disposal options in Government institutional facilities, public places (Government and private run) and schools
- Catalyse research & development for environmentally sound products by market leaders and facilitate product adoption at scale through dialogue between market leaders and innovators

OF 336 MILLION GIRLS AND WOMEN EXPERIENCING MENSTRUATION IN INDIA, IT CAN BE ESTIMATED THAT APPROXIMATELY 121 MILLION GIRLS AND WOMEN ARE CURRENTLY USING LOCALLY OR COMMERCIALLY PRODUCED DISPOSABLE SANITARY NAPKINS[1]. THIS MEANS THAT 36 PERCENT OF THE MARKET IS CURRENTLY BEING REACHED THROUGH COMMERCIAL AND GOVERNMENT ENTITIES.

However, the organized sector is estimated to have a much lower penetration of approximately 15 percent[2]. The difference is presumably due to a significant increase in use of sanitary pads amongst the youth – 57.6 percent of girls in the age group of 15-24 are currently using locally or commercially produced sanitary pads[3].

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 machines 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 the products currently available in the Indian market, the majority of products reaching urban and rural consumers are likely to be disposable, non-compostable sanitary pads. Private sector players including Procter & Gamble Health and Hygiene and Johnson & Johnson have historically invested in category development of products, supported with heavy advertising making them available through their pan India distribution networks. Government programs also typically procure these products owing to the cost advantage they offer because of being manufactured 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 MHM, 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 making 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(LeBlanc, 2017), but because of the super absorbent polymers contained in commercial sanitary napkins, they absorb and retain thirty or more times their weight in fluid.(Gupta, 2014)

Given this concern, various social enterprises and public health organizations have introduced menstrual hygiene product innovations that hope to tackle the environmental impact issue. These players 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 catalyzing the industry in a direction that offers more sustainable products at scale.

[1] Census 2011 population data and International Institute of Population Sciences (2017). National Family Health Survey – 4, 2015 – 2016: India Fact Sheet

[2] Census 2011 population data and industry reports for market share and revenue of the FMCG company with the largest market share in this segment

[3] International Institute of Population Sciences (2017). National Family Health Survey – 4, 2015 – 2016: India Fact Sheet

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:

Menstrual hygiene products available in India defined by environmental impact:

Reusables

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 than disposables.

Cloth pads

Hybrid pads (with non cloth barrier)

Menstrual Cups

Compostable Disposable

Disposable products with **high degree of compostable content.**

One time use and materials conducive to composting; **limited impact on disposal.**

Layers sealing aborbent layer should have high degree of compostability.

Limited players in India with only one product variant each.

Currently **higher cost** than non-compostable.

Sanitary pads - banana fibre or wood pulp

Tampons

Non Compostable Disposable

Disposable products 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 (MNCs, social enterprises, SHG units, Government network).

Cellulose based sanitary pads with plastic barriers or with plastic barriers and SAP

Cellulose based panty liners

PRODUCT CONSIDERATIONS ACROSS THE MHM VALUE CHAIN

It is important for market players (private sector and Government) operating at scale as well as consumers to be cognizant of a host of factors while choosing menstrual hygiene products

AWARENESS

- Myths and taboos
- Menstrual hygiene as a human right
- Need for safe, hygienic MH products
- Awareness of product and brand
- Point of sale, price
- How to use product
- Hygienic use of product - no overuse
- Hygienic cleaning & maintenance (for reusables)
- Health seeking behaviours

ACCESS

- Cost to the consumer
- Ease of access - physical reach
- Point of retail should allow for choice - multiple products, brands
- Can the woman/girl interact with retailer to get information on product
- Purchase decision-makers should be engaged
- Luxury taxes and duties

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
- Hygienic maintenance (for reusables)
- Access to private water, sanitation, and hygiene facilities

WASTE MANAGEMENT

- Raw materials and ability to degrade
- Frequency of disposal
- Quantum of waste generated
- Ease of segregation
- Community systems for waste management suitable for product
- Disposal bin in sanitation facilities
- Responsibility for collection and disposal of menstrual hygiene waste

2 **MENSTRUAL HYGIENE PRODUCTS**
In India