



## Scope and Opportunities for Menstrual Health and Hygiene Products in India

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### Abstract

*Menstrual hygiene continues to be amongst the most challenging development issues today. Not only do deep-rooted taboos, myths and misinformation create the illusion that menstruation is inherently shameful, gross and weird, but in countries like India, women and girls often lack access to hygienic sanitary materials and basic facilities Sanitary Pads necessary for good menstrual hygiene management (MHM). "Sanitary Protection: Every Woman's Health Right" a study by AC Nielsen reveals only 12 % of India's 355 million women use sanitary napkins. Over 88% of women resort to shocking alternatives like un-sanitized cloth, ashes and husk sand. Incidents of Reproductive Tract Infection (RTI) are 70% more common among these women. The biggest barrier to using a Sanitary Napkin (SN) is affordability. Around 70% of women in India say their family can't afford to buy them, 88% of women use old fabric, rags or sand to manage their flow. This tells the immense entrepreneurial opportunities in the segment. A recent study anticipate the industry to grow to INR 45.9 billion by 2017.the only need to work in this direction is the reduction in cost of production.*

**Keywords:** Menstrual Hygiene, Sanitary Protection, Markets for sanitary napkins.

### Introduction

"Sanitary Protection: Every Woman's Health Right", a study by AC Nielsen concluded that out of India's female population (355 million), only 12 % use sanitary napkins<sup>1</sup>. Over 88% of women depend on different alternatives like un-sanitized cloth or rags, ashes and husk sand. Some Serious women diseases such as Reproductive Tract Infection (RTI) is 70% more commonly visible among these women. Studies on this topic reveal that the greatest barrier of using Sanitary Napkin is its high cost. In a survey, around 70% of women in India say that their family can't afford to buy them. Rs 150-crore scheme by Union Health Ministry was launched in 2012 to increase access, affordability and use of Sanitary Napkins among adolescent girls in rural areas. Under this scheme, packs which contain six SNs are provided to Below Poverty Line (BPL) girls at a subsidized cost of Rs 1 per pack. Girls in the Above Poverty Line (APL) category need to pay Rs 6 per pack of sanitary napkins, which is again very nominal.

Accredited Social Health Activists (ASHA) and Auxiliary Nurses and Midwives (ANM) of NRHM are also taking steps to improve menstrual hygiene like, free distribution of sanitary napkins to adolescent girls especially in rural areas, But the question arise about the sufficiency of these steps? If cost is the only reason behind poor menstrual hygiene among women in India then after such steps by government this situation should have been improved but the data is not reflecting in the same results that mean there should be other factors which hindrance the market development of menstrual hygiene products in India.

### Objective of the Study

The objective of the present study is to examine different opportunities and challenges related to menstrual health products and its related marketing challenges in Indian Context. In addition this paper also examines the initiatives taken by various organizations in the existing Industry for creating awareness and affordability in this direction, as well as the future prospects in this segment. Present Challenges in Indian Market: i. Awareness: Nearly half of the Indian women are mostly neglected especially relating to their gender specific needs<sup>2</sup>. On an average a woman spends 2100 days of her life menstruating but accessibility and affordability of menstruation products is largely absent, which restricts women's mobility and affects the development of adolescent girls In rural India the problem is exacerbated as many women have not seen sanitary napkin, nor are they aware about their use. Many poor women menstruate on their skirts or use the same set of cloths for months together. ii. Cost: In the Indian competitive market, Maximum of the available sanitary napkins are beyond the purchasing power of lower income group women<sup>3</sup>. They can't afford the product every month. About 70% of India females have similar excuse that their families do not have enough purchasing power to spend on such products. On an average, a pack of 10 sanitary napkins (Medium Quality) costs about INR 30-40. Hence, statistically average spending per woman per month would be around INR 48, which is too much expensive for a women belonging to low-income group family. For an ordinary village woman, the choice would often be between buying milk for the children or sanitary napkins for her.

Recognizing that the biggest impediment in this market segment is affordability. The findings reveal the gap in supply chain of sanitary napkins. iii. Availability: Big brands such as Stayfree and Whisper from Johnsons & Johnsons and P & G lack to approach bottom of pyramid consumers. Out of 187 general and provision stores from 62 villages, not one (0%) of them sell/stock sanitary napkins<sup>1</sup>. Vendors in rural areas report supply of sanitary napkins. There is an urgent need for a new orientation which boosts entrepreneurship in menstrual health and hygiene and enterprises and institutions following a bottom of pyramid strategy to reach India's vulnerable sections. The enterprises need a sustainable as well as profitable business perspective.

## Hypothesis

Entrepreneurial initiatives in menstrual hygiene products either by the government of India or by big private leading companies, lack to address the needs of bottom of pyramid consumers.

Entrepreneurial Opportunities: Few examples: A Research had conducted by NIIR Project Consultancy Services on Feminine Hygiene Products (Sanitary Napkins and Pads) to study on menstrual Hygiene industry in India, analyzed that Indian market has leading share by few Multinational companies like Proctor and Gamble Hygiene Healthcare Ltd (PGHHL) and Johnson and Johnson Ltd<sup>4</sup>. They left very small scope for the other firms to operate in this market segment. Already they are growing at the rate of 21% in the past. This study has made sales forecast about these MNCs to grow at the rate of 25% in the near future. The major hurdle to increase the aggregate demand of the product can be illustrated as lack of awareness among female about their own hygiene during menstrual cycle<sup>4</sup>, availability of the product in the market and its high cost. This report made a thorough analysis about sales forecast for the Industry will grow to INR 45.9 billion by 2017. In May 2012, Arunachalam Muruganatham, who is popularly known as the 'Menstrual Man' in India, found the root cause of high cost of the product which lies in its fixed cost for machinery, which is necessary to convert fiber used in sanitary napkins into absorbent cellulose. Till now most of the companies in Indian market are importing this machine. For an average entrepreneur in this segment, this cost is too high to manage. He has developed a simple machine which can be replaced this expensive machine and convert fiber into absorbent cellulose. there was one study on the habits of menstrual hygiene among unmarried women (n=36,7850) held in the year 2007-08 at all India, this study provides strongest reason for low usage of sanitary napkins is its high cost<sup>5</sup>. Therefore if we can reduce its cost, number of users can be increased gradually. There are some small industries which are doing really well to bring revolution in this product segment.

**Case study Number-1 'Jayaashree Industries':** The major fixed cost in this Industry is spent on Machine, Jayaashree Industries made a revolution by using a country made machine

which can be run by electricity as well as foot pedals, hence this machine can be easily installed in villages to create a micro unit run by a group of women and electricity can become a constrain in their production unit. This machine can produce 1,000 napkins a day, which is not too small for a micro unit. The cost of production is controlled by other factors as well and they have reduced the cost to Rs 16 per 8-pack. However, the company has decided to focus on development of whole rural society instead of just focusing on its commercial use. This firm is focusing to empower rural women to purchase the machine, at a nominal cost of Rs 80,000. This approach can encourage the several women entrepreneurs at small scale but this way the product can reach the bottom of pyramid. If the product is developed through women entrepreneur, there will be no need to make any efforts separately to create awareness among them for the use of the product, in this way Jayaashree's Industry has major innovation for the growth of this Industry. Till date Jayaashree Industries has sold more than 745 machines across 23 Indian states of India which trickle down its effect on more than 3.5 million women to use low cost sanitary napkins. One more problem can be solved through this approach which is availability in remote areas; if sanitary napkins are produced by micro entrepreneurs the product will be locally available so that supply chain management will be more efficient.

**Case Study Number -2 'Azadi group':** The company 'Azadi' has developed a product which is 100% biodegradable. This is a revolution and solved the problem of many social scientists. Their product is 43% cheaper than the available product in this segment. This great combination of biodegradability and low cost has a power to revolutionize the whole Menstrual Hygiene Industry. Founder of the group, Dharendra Pratap Singh and Ameet Mehta, have approached angel investor to fund their innovation and they made a contract with Chicago-based incubator to get the capital of \$115,000. Still to reach every consumer in Indian Market is a challenge. Although the company is providing training to several groups of female entrepreneurs to make sure that the product can reach to bottom of the pyramid<sup>6</sup>. They have already started in the Bahraich and Shrawasti District of Uttar Pradesh under pilot project.

**Case Study Number -3 'Mahalakshmi Self Help Group':** Learning from experiences across Water-Aid and the partners a women's group was encouraged in manufacturing, safe, disposable and affordable sanitary napkins. The study on understanding the real situation in these remote tribal villages has helped develop practical solutions not just in manufacturing but adopting social marketing approaches to create demand to ensuring the product reaches the target audience through dissemination of knowledge and distribution of materials. Women are the managers, makers and distributors of the sanitary napkins. Mahalakshmi Self Help Group established their production unit in the interior of Navpara village, Chhattisgarh situated in a remote location due to which women didn't have access to health centers. It was supported by Water-Aid, India and Carmdaksh a local partner organization<sup>7</sup>.

Research findings show before establishing this unit it was found that within an area of 15 KM sanitary napkin is not available and none of the women and girls from the 62 villages ever used sanitary napkins. The initiative creates livelihood opportunity to their group members as well. The detailed break of investments is given in Table-1. Accordingly total investment is just INR 1,20,000 which is feasible with the help of micro credit programs. If this kind of manufacturing units gets associated with social benefit schemes like MGNREGA (Mahatma Gandhi National rural employment guaranteed act), neither need we to put any efforts in spreading the awareness nor for women unemployment.

**Table-1**  
**Cost of Sanitary Napkin (Production Unit)<sup>1</sup>**

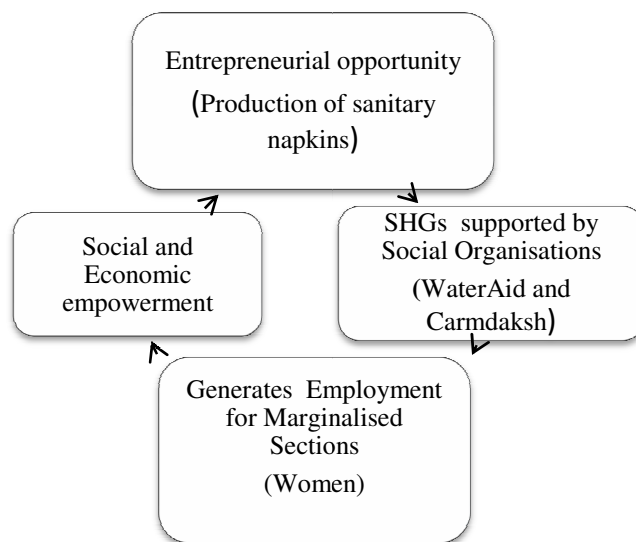
Items	Amount (INR)
Non-Woven Fabric (50 kg)	10,000
Packaging	15,000
Electrical Fittings	3,000
Sealing Machine	1,350
Scissors,boxes and tray to handle	2,000
Workshop Maintence	12,000
SHG Member Uniform	2,000
Dust free/air proofing	5,000
Miscellaneous	5,000
Total	1,19,500 Round off 1,20,000

The Mahalaxmi group is selling the napkin at a cost of Rs. 2.5 as against products from popular brands whose retail price is a minimum of Rs. 3 – 4 per pad. The experiment initiative has ensured affordability, and accessibility of sanitary napkins in the most interior area where women have not seen sanitary napkins until this unit came into existence. Women who have never seen napkins earlier are now producing napkin. Several actions are taken to maintain quality standards such as production room kept exclusively for producing napkin, use of mask, gloves and head caps, no entrance to children, entry only after washing hands and feet, use of auto-clave for sterilizing and packing immediately after sterilizing. Mahalaxmi Self Help Group has demonstrated sanitary pit along with toilets of this group members for promoting safe method of disposal. Women dispose of napkins in sanitary pits where it takes about 3 months to decompose. Women also dispose of napkins by burning them in homemade incinerators<sup>1</sup>.

Development of menstrual health product market: Rules for success: I Stage - Education and making sanitary napkins available in school, II Stage - Affordable napkins Promotion

through Self Help Groups, III Stage - Up scaling by mainstreaming through convergence of different streams like in women and Child Welfare Department and Health and family welfare ministry, IV Stage - Wider dissemination through display, dissemination and promotion at exhibition or mela, V Stage - Enhanced supply chains by sensitizing local vendors for marketing of locally produced products.

In this way these small production centers are generating employment for women which bring more equality in the economy. If the group of women is engaged in its production, there is no need to bring awareness about the usage of the product among this group and gradually information will penetrate into lower strata of the society. Hence this policy of promoting micro entrepreneurs can address the issues such as: women employability, availability of the product at rural level, cost of the product, awareness about the usage of the product.

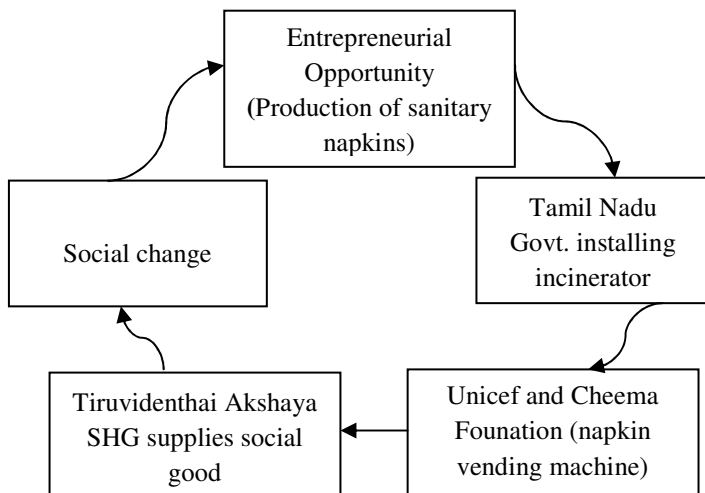


**Figure-1**

**Model of social change develop by Entrepreneurship skills of Mahalakshmi Self Help Group**

**Case Study: 4: Tiruvidenthai Akshaya Self-Help Group under Public-Private-Community Partnership:** Corporate social responsibility can play a vital role in this segment. This argument has proven by Tiruvidenthai Akshaya Self-Help Group<sup>8</sup>. This group is working in and around Kancheepuram District of Tamil Nadu where the average per capita income is low. Since the maximum households cannot afford sanitary napkins, the young school going girls had to depended on traditional methods (old cloth, Rugs). But now, sanitary pads are available for just Rs 2 through vending machines. The napkin vending machine sponsored by UNICEF and ShriCheema Foundation, an initiative in corporate social responsibility by TVS Electronics Ltd., is a boon to the girl students. Incinerator for the safe disposal of sanitary waste has been installed by the Tamil Nadu Government in 2004 under the Total Sanitation Campaign. The girl students of the rural school are now aware

of the issues of reproductive tract infections and of the importance of hygiene practices.



**Figure-2**  
**Most likelihood outcome of social change by various stakeholders of society**

This is one of the best examples that reflects how Public-Private-Community partnership motivating small social enterprises which supply the scarce public good with a mutual co-operation from different stakeholders of society facilitating a social change.

## Conclusion

Marketing opportunities for menstrual products in India: i. Increasing the consumer Base: if the product is manufactured by micro enterprises there will be huge increase in the availability of the product, hence consumer base will be enhanced to increase the market size in India. ii. Cost reduction: Wealth Index Quintiles reflect that 47% of female uses sanitary napkin while only 5% among poor income household. Hence this should be considered as normal commodity so we can assume that there is high correlation price and quantity demanded. With the above case of production there is scope of high reduction in prices that will surely boost up the quantity demanded of the product, which will provide high positive externalities on women menstrual health. iii. Lack of standardization: on the basis of the District Level Household and Facility Survey (DLHS-3) 2007-08, there is huge variation in the usage of locally prepared Napkins. The northern states like Chandigarh, Uttar Pradesh and Himachal Pradesh show high usages. While the states which has more developed market like, Haryana and Chhattisgarh locally prepared Napkins are not very popular. The probable reason for this high discrepancy could be availability and easy access of product. iv. Less awareness and poor availability of the product<sup>8</sup>: Besides all the efforts in different government policies and programs, the availability of the products is limited to particular developed markets and medical centers; another responsible factor in this direction is low

awareness among women about the product. Still the women consider menstrual hygiene product as luxury product, hence there is immediate need to make women aware. It is very important to spread this awareness that these age old practice of using cloths and locally prepared napkins among women increase the risk of spreading of reproductive tract infections among women. v. Opportunities at Village level through Public Private Partnership: companies like Azadi group or Jayshree Industry of Mahalaxmi SHGs can be collaborated with the schemes like NREGA to create employment opportunities at village level and this could also increase the awareness at grass root level. if a small innovative step can bring so many positive changes in the market of menstrual hygiene products through PPP model (Tiruvidenthai Akshaya self-help group), then at the macro level these can solve the powerful hurdles like availability, awareness, cost effectiveness and women unemployment.

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