



BNP PARIBAS



Menstrual Hygiene and Health Development Impact Bond

Pillar 2 Assessments Report Current Supply Chain in Sanitary Products, Opportunities and Threats in Growing Market

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GAA Economic Development Consult

Acronyms

AFD	French Development Agency
CBO	Community Based Organization
DIB	Development Impact Bond
ETB	Ethiopian Birr
FGD	Focus Group Discussion
MHH	Menstrual Health and Hygiene
MHM	Menstrual Hygiene Management
NGO	Non-Government Organization
PSI	Population Service International
SNNPR	Southern Nations, Nationalities Peoples Region
SPSS	Statistical Package for Social Science
VSLA	Village Saving and Loan Association
WHO	World Health Organizations
WTP	Willingness to Pay

Executive Summary

Introduction

This report is extracted from the pillar 2 assessment conducted in Addis Ababa and Adama. The assessment aimed at providing analysis of the overall MHM economy and the current supply chain in sanitary products, opportunities and threats in the growing market. This includes importers, manufacturers, distributors, wholesalers and retailers of sanitary products in Addis Ababa and Adama. It also aims at highlighting the willingness to pay for the different sanitary products by schoolgirls and adult women.

Methods

This assessment followed cross-sectional study design. Data collection with respect to the supply chain actors and the overall sanitary products market started in Addis Ababa and data collection at Adama focused on the wholesalers and retailers as well as preferences of the customers. The methods of data collection include in-depth interviews, physical observation, focus group discussions and reviews of relevant documents. Importers, manufacturers and distributors of sanitary products were interviewed using the semi-structured questions in Addis Ababa, whereas at Adama level the wholesalers and retailers were covered. Photos of the types of sanitary products supplied were taken at each level. Focus group discussions were made separately with schoolgirls and adult women to understand their preferences, perceived advantages and disadvantages of using sanitary products.

Findings

Sanitary product markets are contributing to the whole economy in Addis Ababa and Adama. Considering the existing demand for sanitary products, the annual MHH economy in Adama is over ETB153 million. This, however, excludes the economy that could be generated from women and girls living on the street (there are migrants from different corners coming to Adama for work, and these are not considered in the population estimate).

The sanitary product supply chain actors include importers, manufacturers, distributors, wholesalers and retailers. Retailers include pharmacies, shops, mini and supermarkets. Reusable products are distributed by NGOs to schools and health care facilities, but not yet introduced to the local markets.

Access to sanitary products in schools has positive implications on the attendance and education performance of girls. Similarly, access to affordable sanitary materials increases the productivity of women by addressing problems associated with missing or interruption from their work. It was reported that access to menstrual materials improves the privacy, dignity and welfare of women and girls.

In recent years there has been an increase in the number of availability of different types of both imported and locally produced reusable MHM products, though the challenge remains in reaching out to the neediest women and girls, and also the issues associated with the quality of the products. This requires more intervention in terms of quality control and increasing access to MHM products to the less privileged group.

It was reported by the schoolgirls that some sanitary products have issues that creates discomforts in utilizing them, which among others include itching, irritation, frequent loose of belt, unfitness, poor absorbability, and decomposing. These side effects needs to be communicated with the companies supply the sanitary products.

Suppliers and manufacturers are facing challenges related to accessing foreign currency, devaluation and inflation, which increases the price of sanitary materials causing non-

affordability by the lower income groups. In addition logistic problems like shortage of containers to import raw materials and issues related to the quality are identified as challenges. Besides, availability forgeries in the market are reported as a challenge.

Recommendations

Based on the findings from this assessment the following recommendations are given to improve the supply chain for sanitary products.

- Relevant government body (ministry of health) needs to work on standardization of sanitary products to distinct forgeries and avoid low quality products entering the markets.
- The government should also facilitate easy access to foreign currencies for importers of sanitary products and importers of raw materials for local manufacturing to increase market supply.
- Affordability is one the biggest challenges in the supply of sanitary products and reaches out to women and girls. The high costs of sanitary products are related to the devaluation of currencies, inflation and government tax. Therefore, the government should exempt taxation of the MHH product business to ensure wider coverage of the poorest women and girls.
- Lack of menstrual health and hygiene services in school is equivalent to saying girls ‘do not go to school’, which potentially affect the right of girls and impact negatively on their livelihoods. Even if they go to school, they are forced to miss classes 3-5 days a month, which significantly affect their education. Hence, sufficient attention should be given to menstrual health and hygiene management in schools including allocating specific budget to menstrual health and hygiene related activities.
- The reusable pads, especially those cost effective ones, are not available in the market at the time of this study. This was mainly because of the low level of awareness among the women and girls. Reusable sanitary products are distributed through NGOs for schools and health care facilities. The government and relevant development partners should strongly promote reusable sanitary products aiming at creating sufficient demand for the gradually growing market.
- The Ethiopian Standards Agency should also be involved to come up with standards on the disposal of pads, that is, compostability, incineration and so on. This can be built up on the disposal mechanisms indicated in the national MHM policy and implementation guideline.
- The assessment also found out that there are some weak sides of disposable sanitary pads as reported by schoolgirls. Some of these include poor absorbability, decomposing, frequent loose of belt and irritation. The companies producing those specific products need to work on the gaps in collaboration with the Ethiopian Standard Agency and come up with the improved sanitary products to the market.
- In order to increase the demand for the supply of disposable sanitary products and increase access of poor women and girls, there should be activities related to women’s economic empowerment like income generating activities.
- At the time of the assessment companies manufacturing reusable and disposable sanitary products are not operating at their full capacity mainly because of the low demand and hence the low turnover. Working on the demand side is critical to improve wider supply of sanitary products.
- All retailers visited in Adama during the study reported that they are not interested to stock sanitary products due to the low turnover. Working on the demand side, on the one hand, and on economic empowerment on the will help in activating the markets for sanitary products.

1. Introduction

1.1. Project background

CARE Ethiopia, in partnership with PRO PRIDE, is planning to implement a three-year program “Development Impact Bond” in Adama Town and its surrounding peri-urban kebeles, in Oromia Region. The DIB program is funded by the French Development Agency and by the BNPP and aims at the development of Menstrual Health and Hygiene (MHH) management activities in Ethiopia. This program aims to empower women and girls and in turn improve their social status. The program targets girls aged 7-18, women aged 19-49, as well as boys and men.

This assessment focuses on the pillar 2 of the DIB program, that is, the production and distribution of activities to strengthen the local supply of a variety of MHH products that meets different needs. This includes (i) subsidized distribution of MHH kits (4 pads in urban areas, and 4 pads and 2 pants in rural areas) to schoolgirls through a voucher based system, (ii) training of schoolgirls and women factory workers in self-making reusable sanitary pads for personal use; and support students in setting up school shops and to retail shops nearby schools to supply a variety of MHH products, (iii) training peri-urban VSLA members on door to door sales of a range of MHH products, and (iv) develop national and local networks of supply chain actors for a range of MHH products.

The assessment emphasizes on outcome 2 of the DIB program, that is, production and distribution of sustainable sanitary products – strengthened and sustainable local market in the supply chain of a variety of types of disposable and single and multiple use/ecological sanitary products meeting different needs. The supply chain includes looking at importers, manufacturers, distributors, wholesalers and retailers.

The program aims to support the promotion of micro and large local private sector by identifying and helping to lessen the obstacles in the supply chain and by working with women’s village groups, door to door sales by women, school shops or retail outlets near the schools.

In general the program is targeting 404,929 people in Adama administrative town and peri-urban areas. Within this wider population, additional targeted work will be done with an estimated 1047 university students, 1020 factory workers and 775 peri-urban women’s groups and 92,519 school students.

1.2. Purpose and objectives

Purpose of the assessment

The purpose of this assessment was to provide analysis on the current supply chain in sanitary products, opportunities and threats in the growing market. The supply chain includes looking at importers, manufacturers, distributors, wholesalers and retailers in Addis Ababa and Adama. It also aims to highlight the willingness and ability to pay for the different sanitary products.

Specific objectives

- Provide an overview of the MHH economy in Addis Ababa and Adama by looking at the importers, manufacturers, distributors, wholesalers and retailers
- Provide more analysis on some critically important companies operating in the formal and informal economy, focusing on regulatory barriers faced by the sector

- Highlight willingness to pay for each type of MHH products (reusable, disposable, cups, tampons, self-made) by adult women; and willingness and capacity to pay for sanitary products by schoolgirls
- Analyze knowledge of sanitary products and perceived advantages and disadvantages by adult women
- Analyze reasons for why retailers stock or do not stock each type of MHH products, and the average margins they take

1.3. Scope and limitations

Scope of the work

The assessment focused on the pillar 2 of the DIB program, and it provides analysis on the overall MHH economy in Addis Ababa and Adama. It maps out the supply chain actors, the type of sanitary products they supply and the key features of the materials showing their suitability for use. It analyzes how the market works to increase access to sanitary products in Adama and its periphery kebeles at school, home and work places. The assessment was conducted using qualitative approaches.

Study limitations

Assessment of wholesalers and distributors of sanitary products was somehow challenged by the level of transparency that was assumed to affect business competition. As a result, they showed resistance to cooperate with the team. The team however made utmost effort to convince the suppliers that the information collected will be confidential and by no means shared with others.

Retailers such as shops and pharmacies also showed resistance to provide information about the sanitary product business, in fear of exposing themselves for income tax. The team solved this suspicion by showing up the support letter and making them understand the purpose of the study.

Industrial park and bigger private factories were not interested to cooperate with the team in fear of the current security situation. The team then approached other factories like Brothers, Africa and Nazareth and Arsi Soap and Oil factories to administer survey questionnaires on sample women working at the factories.

The time of the assessment overlapped with the nationwide state of emergency proclaimed to ensure security, and this situation put some pressure on the group discussions at community level. In order to facilitate the whole process, the team approached the command post at town and kebele levels and obtained permissions.

2. Methodology

2.1. Study design

This assessment followed cross-sectional study design that guided data collection at a given point in time. Data collection started with the suppliers in Addis Ababa and the wholesalers and retailers in Adama and its peripheries. Importers, manufacturers and distributors of sanitary products were consulted in Addis Ababa, whereas at Adama level the wholesalers and retailers were covered. Finally, perceptions of consumers (women and girls) on different types of sanitary products were assessed including the preference and willingness to pay. The target population for this assessment was women and girls.

2.2. Sampling technique

This assessment used purposive sampling technique to identify and include sanitary product suppliers and users in data collection. The sanitary products suppliers considered in the assessment include importers, manufacturers, distributors, wholesalers and retailers. As the lists of suppliers were not available, a snowball sampling technique was used to include more suppliers in the assessment. Table below presents the lists of sanitary products suppliers included in the assessment.

Table 1. Summary of sanitary products suppliers visited

No.	Category	Number of suppliers by category	Location
1	Importers	2 importers	Addis Ababa
2	Manufacturers	4 manufacturers	Addis Ababa
3	Wholesalers	8 wholesalers	Adama
4	Retailers	12 (pharmacies, supermarket, shops)	Addis Ababa and Adama
	Total	26 suppliers	

2.3. Data collection methods

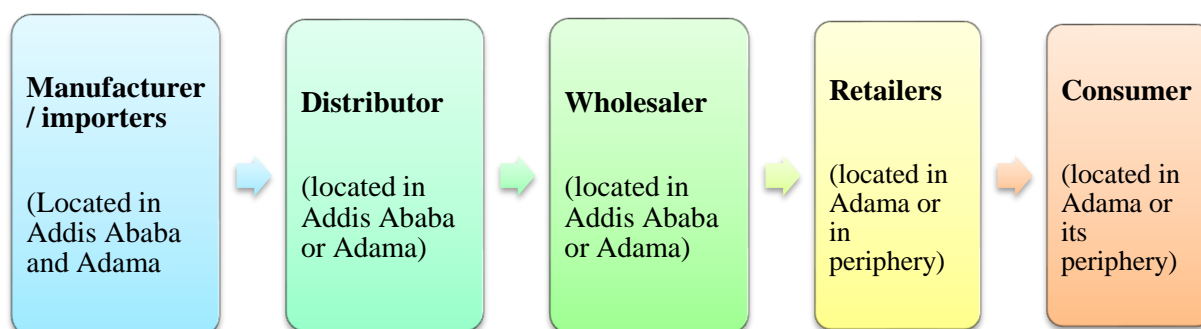
This study used participatory qualitative methods to collect data, including desk reviews, in-depth interviews, focus group discussions and physical observations. Paragraphs below provide more information on the methods used for the assessment.

Desk reviews

Relevant documents including project and government documents were reviewed in line with the purpose of the assessment. The menstrual hygiene management implementation guideline, previous studies by different organizations and the project documents were among the documents reviewed. Refer the reference section for details.

In-depth interviews

Mapping of sanitary products suppliers were challenged by the absence of the whole lists of the companies, but obtained certain importers, manufacturers and wholesalers from previous studies carried out by UNICEF and PSI. Others were further accessed through a snowball sampling technique. Interviews were conducted with selected suppliers at Addis Ababa and Adama levels using the semi-structured questions prepared for the purpose. The following diagram illustrates the sanitary products supply chain actors visited at Addis Ababa and Adama City Administrations.



The interviews covered those involved in the sanitary products business and looked into the type of products supplied, product features, the factory price, opportunities and threats to the growing sanitary products market. It also looked into how the sanitary product market works in Addis Ababa and Adama, that is, whether the forces of supply and demand governs the market.

Besides, relevant MHH service providers such as health office, education office, schools, and women and children affairs office were interviewed to understand the priority given to menstrual health and hygiene.

Focus group discussions

This assessment used focus group discussions with schoolgirls and women to understand their preference to sanitary products, perceptions on the advantages and disadvantages of different types of sanitary products (reusable, disposable). Eight FGDs were conducted with schoolgirls and four FGDs with adult women.

Physical observations

The sanitary products supplied by selected importers, manufacturers, distributors, wholesalers, and retailers were observed and photos were taken. Wholesalers, distributors and retailers, however, supply any sanitary pads based on the request and have no specific sanitary products.

2.4. Data analysis and writing report

Analysis of quantitative data

Quantitative data related to the supply chain analysis include the price of menstrual materials, willingness and ability to pay for sanitary products. These data were collected as part of the survey and also through focus group discussions and interviews. The data collected through the survey were analyzed by SPSS. The results were then triangulated with the qualitative explanations on the affordability of the menstrual materials.

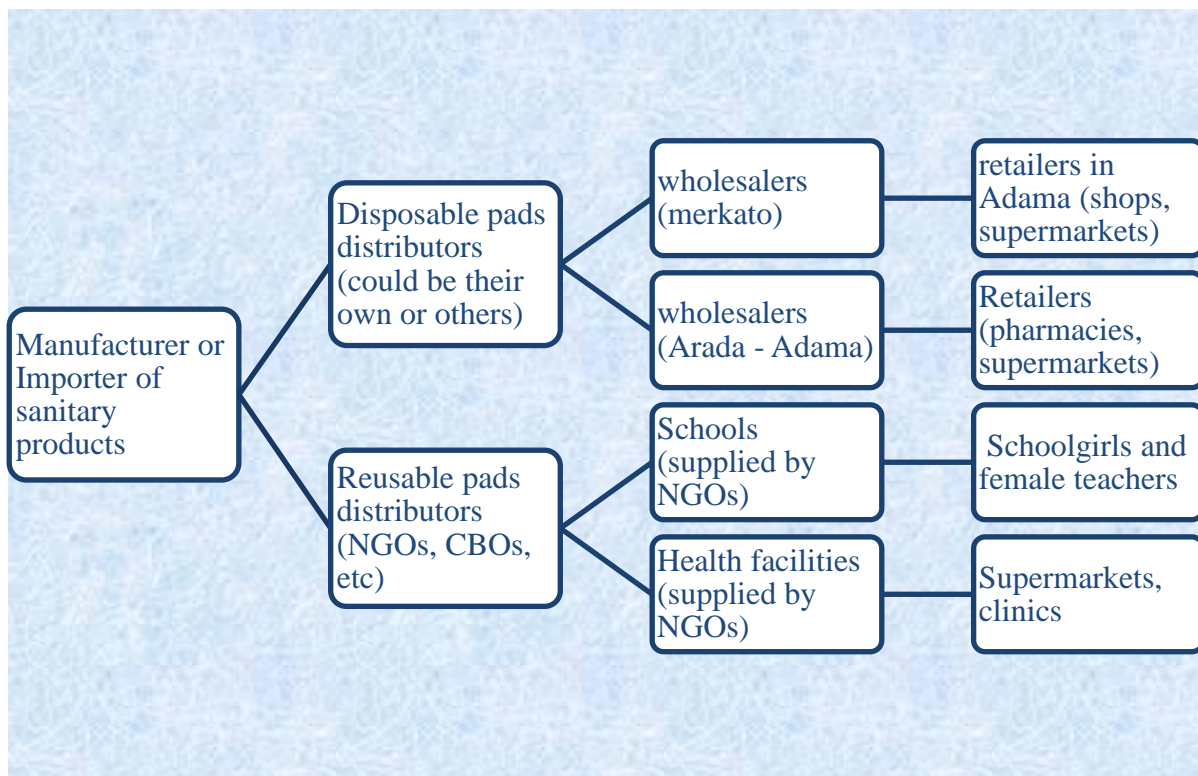
Analysis of qualitative data

Qualitative data collected through interviews and focus group discussions were transcribed into English, and analyzed thematically. The perceptions and views of women and schoolgirls regarding the use of menstrual materials were analyzed based on their socioeconomic background. Content analysis followed the purpose of the assessment and the report produced undergone refining procedures to produce concise report based on recursive abstraction methods.

3. Key findings

3.1. Overview of MHH Economy

Sanitary products supply chain involves manufacturers and importers, distributors, wholesalers and retailers. Unlike other commodities, it was found out that sketching the supply chain actors from the importer/manufacturers to the users is not an easy task. This was because of the fact that menstrual materials can be imported, distributed, wholesaled and retailed by any company involved in supplying drugs, medical equipment, cosmetics and others. Sanitary pads are not commodities that have high turnover and wholesalers and retailers are less interested to stock. It is considered as a sideline activity for medical input suppliers. Disposable sanitary products are marketed through distributors, wholesalers and retailers at different scales. Distributors negotiate with the manufacturers and/or importers on the price margin, and similarly wholesalers negotiate with the distributors on the prices. Retailers compare the prices across the wholesalers and make purchases. Finally, they add 25 to 30 percent price margin on customers. On the other hand, reusable sanitary products are marketed through NGOs, which directly supply the products to schools and health care facilities. The following diagram illustrates the supply chain actors for sanitary products, as it can take any of the routs.



Interviews with the supply chain actors indicated that the market for sanitary products depend on the forces of demand and supply, though in some schools the pads are freely supplied to girls coming from the poor families. There is no hard rule that shows a given retailer buys from the wholesaler or the wholesaler from the distributor or manufacturers of sanitary products. The fact that the demand for sanitary products is very low especially in rural and peri-urban areas forces retailers not to stock or buy in bulk. The low demand for sanitary products emerges from lack of awareness and low level of affordability especially by the poor and marginalized groups.

The commercially disposable MHM products available in markets include the P&G's Always, S.Y Comfort (both imported from China), Eve and Eve Comfort, Rose, Bella and

Monaliza, Flexi and Michot, and these menstrual products are produced locally in Ethiopia. Interview results indicated that there has been an increase in number of disposable sanitary producers over the past few years due to the exemption of tax on raw materials imported from foreign countries.

Findings from the interviews made with manufacturers and wholesalers in Addis Ababa showed that producers/importers supply menstrual materials to wholesalers primarily based in Merkato while their own distributors directly supplying to shops, pharmacies and supermarkets. The current prices of disposable sanitary pads ranges from ETB 30 - 35 per pack for the locally produced, and ETB 45 – 55 per pack¹ for the imported. The reasons behind the high price of disposable pad were reported to be the high import taxes and challenges related to the logistics and devaluation.

On the other hand, reusable menstrual hygiene management products include the Noble cup (insertable), Safe pad, Mela for her, Maryod and Ham garment (Momypad). While Noble cup and Safe pad are imported reusable MHM products, the rest are produced in the country. Unlike the disposable one, the reusable menstrual products supply primarily targets NGOs that distribute to schools and health facilities. Noble cup supplied to Michu clinic, pharmacies and supermarkets; it has also been sold on an Online-Deliver Addis. Similarly, Safe pad is piloting direct market supply approach in Somali region. The current prices for reusable menstrual materials were found to vary depending on the type, quality, and the price ranges from ETB 100-260 per kit or cup.

According to the interviews made with suppliers in Adama, shops, mini/super markets, and pharmacies sell different types of disposable sanitary pads, including Always, Comfort, Eve Comfort, Rose, Bella, Michot, Smart, Flexi and Latex. The retailers get the supply from Adama – Arada market and wholesalers/distributors in Addis Ababa. The informants indicated that demand for the sanitary pads is high among women and girls of well to do families and conformability depends on the individual variation. For instances, women with excessive menstrual flow prefer the thick pads with good absorption capacity, and do not buy the thin types such as ‘Always ‘pads. However, most customers prefer EVE brand of sanitary product primarily due to promotion playing a great role in dominating people preference especially girls. Concerning affordability, the informants believe that it is the people with buying capacity who can afford with current price. It was also reported that the price for sanitary pads is high and women and girls from the poor families cannot afford/ buy the product. A study by World Bank (2020) indicated that 23.5 percent of the Ethiopian population was poor in 2016, which was 14.8 percent for urban and 25.6 percent for the rural. According to the 10-year perspective plan (2021), the percentage of population living below poverty line was reduced to 19 percent.

The largest proportion of schoolgirls (78 percent) and women (81 percent) reported using disposable sanitary materials to manage their menstruation. Disposable cloth has been used by 8 percent of the schoolgirls and 10 percent of women included in the survey. While only 6 percent of the schoolgirls and 2 percent of women reported using reusable pads during their menstruation.

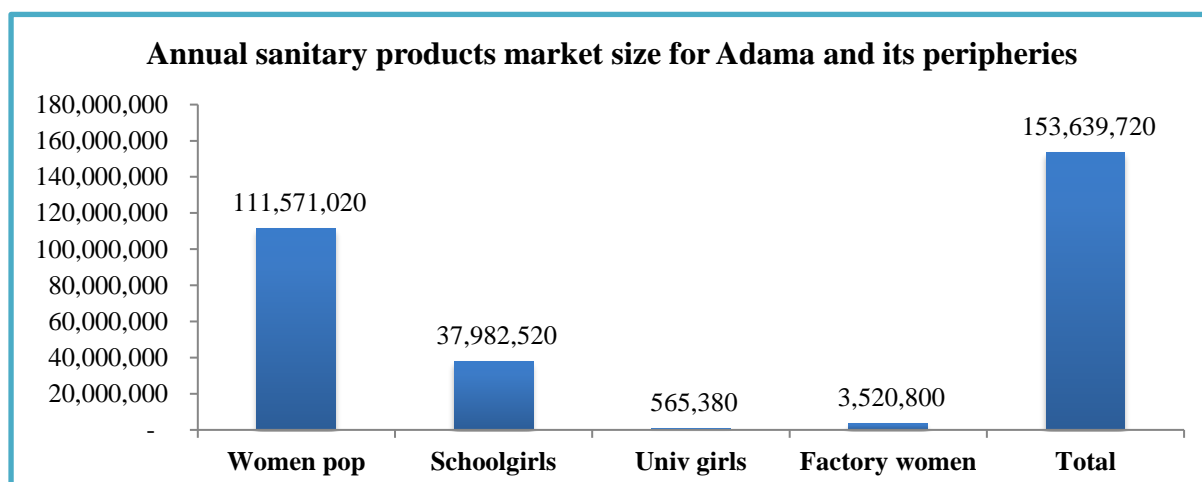
Table below presents the menstrual hygiene management products by type, manufacturer or supplier and their prices. The prices are reported by respective suppliers, including the manufacturers/importers, wholesalers and retailers.

¹ For EVE brand, Rose, Smart, Michot, Bella, Flex, and for some Latex pads, the pack contains 10 pieces while for Always and some Latex pads, the pack contains 8 pieces.

Table 2. MHH products by type, company and prices

Type or category	Company name	Imported /locally produced	Price per pack in ETB
Reusable sanitary products	Noble Cup	Imported	250-260
	Real Relief (Safe Pad)	Imported	Not set price as it is new to market price yet to be set
	Mela For Her	Locally produced	Premium 80 per piece; Basic 40 per piece
	Maryod Reusable Sanitary Pads	Locally produced	28.75 per piece
	Ham Garment (Momy pad)	Locally produced	60- 72 per piece
Disposable sanitary products	P&G's Always	Imported	55 per pack
	S.Y Comfort	Imported	45-50 per pack
	Eve& Eve Comfort (of same company)	Locally produced	35 per pack
	Rose	Locally produced	35 per pack
	Bella& Monaliza (of same company)	Locally produced	30 per pack
	Michot	Locally produced	30 per pack
	Flexi	Locally produced	30-35 per pack
	Smart	Locally produced	35-40 per pack
	Latex	Locally produced	40-45 per pack

The overall MHH economy in Adama is estimated considering the demand and the average price of sanitary products at retailers. The demand for sanitary products is about 284,518² women and girls, at home, schools, university and selected factors. There might be some overlaps for the factory women but there are also unaccounted street women and girls, which even increase the demand. The price for sanitary products from the retailers ranges from ETB 35 to 55, the average being ETB45. Assuming all the women and girls use disposable sanitary pads, the monthly market size would be over ETB12.8 million. Based on this analysis, the MHH economy from sanitary products markets in Adama is roughly over ETB153 million. Chart below provides the overall MHH economy at Adama.



² The number is estimated from the local female population (Adama plus periphery kebeles)

On the other hand, assuming all women and girls use reusable sanitary material like the Noble Cup, which serves for five years, the annual market size drops to ETB17 million that accounts only for 11 percent of the cost for disposable sanitary materials. This means that shifting from disposable to reusable Noble Cup will reduce the cost by 89 percent. The cost will even reduce if women and girls make shift to use reusable Mella Basic³, which costs only ETB40 per person per five years.

3.2. Descriptions of reusable products

Findings from the assessment indicated that there are a number of reusable sanitary products, some of which are in the market while others are under promotion to be introduced to the local market. The following paragraphs explain the key features and challenges for reusable sanitary products.

The Noble Cup

The Noble Cup, founded by Sara Eklund, is the first Ethiopian Menstrual Cup brand that provides safe, affordable option for women experiencing period poverty in Ethiopia. This product is financially sustainable in the long term, as it serves up to five years even with limited access to water or sanitation. Noble Cup distributes these menstrual products and holds workshops with the slogan “Every Queen Bleeds” that teach girls about menstrual health and safety as well as female biology. The workshops aim at supporting the elimination of stigma around menstruation in the country. The company, Eklund leads advocacy projects to make public facilities more period-friendly, such as adding trash cans to bathroom stalls and scientific research posters on female reproductive health issues.

The Noble cup is an insertable cup made from silicon imported from China to Ethiopia. It has been in operation since 2018 in Ethiopia, and has distributed over 7000 Noble Cups to women and girls. It requires less water to clean and can be used for 12 hours, which benefits women and girls with low economic background. The below photo illustrates the Noble Cup.



Currently the primary partners for distributions of Nobel Cup include Michu Clinic (government institution), wholesalers such as Besh Gebeya (mekisiko, Kadisco and Hayat branches), pharmacy and supermarkets such as SAS Pharmacy, Safeway, and Online deliver Addis. The current price of Noble Cup at the wholesale is 200-210 ETB, and the retail price

³ Mella basic is considered for comparison as it is the low cost reusable pad option

is 260 ETB, the importing company puts in place an agreement with the suppliers so that it should not be sold over 300 ETB per a cup.

The product is primarily available in Addis Ababa and the product is mainly used by young mothers. Noble cup is currently not available in retail shops as it requires the seller to give education on how to use the noble cup and requires follow up on three day, three weeks and three months after use. As per the information from Noble cup supplier, once women and girls started using the product, 70 percent continue using it while the rest women stop using it only when they get pregnant, for contraception use or due to family and partner pressure.

The main challenge mentioned by the supplier include, among others:

- paying the upfront cost for most women is difficult,
- lack of knowhow and misunderstanding about the Noble Cup
- stigma and sensitivity of reproductive health issues in the community
- lack of support from the partners or mothers for a women/girl to use Noble Cup
- high government taxation that push the price up (in order to reach more women menstrual materials should be free from tax)
- For Noble Cup to reach to the wider community, it needs to work with already established partners in the community such as existing women structures and groups is an opportunity but need incentives to promote the use of Noble cup such as providing the product through credit/ subsidies since the upfront price is high and stakeholders can cooperate vital on this.

Safe pad

Safe Pad is a reusable sanitary pad produced by Real Relief based in Denmark and imported and distributed by Cellular Trade (Agent) based in Addis Ababa. Currently, Safe Pad made targeted supply to NGOs, and also in communication with other NGOs and is not currently available on market at wholesale or retail level. The company stock up on demand as its new product in Ethiopia and on promotion. As per the information from the company, the price is yet to be set on a negotiation base. The photo below illustrates the safe pad.



Its key features include it can be washed up to 100 times and reused; it is easy to use and comfortable (no irritation) for women and girls and has high absorbability. It is packaged in 4 pieces per pack, of which 3 serves for the day-time and 1 for the night-time use (it is supplied with plastic storage bag). The product is award winning and have WHO standard approval.

Key challenges reported by Safe Pad supplier include:

- The product is new to the Ethiopian market, and this requires partnerships and cooperation with stakeholders.
- It requires strong promotion work to increase understanding about its economic benefits or cost effectiveness and the benefits of using the products compared to others.

Mela for Her

Mela for Her is a reusable sanitary pad in Ethiopia, and the company started manufacturing in Addis Ababa one year ago. It produces two products of different qualities, namely, Mela Premium and Mela Basic. Key features of Mela for Her includes high quality (waterproof, high quality, laminated), durable and can serve for up to five years, comfortable (very slim, less heat and less noise), attractive appearance, anti-microbial effect, and it is supplied with educational kits (period tracking and usage guidance) in different languages. It is packed with linen bags with three different size options. See the photo below.



The main partners for the products are NGOs such as PSI, Swiss Cooperation, Pastoralist Concern (supply to schools) and currently pilot three projects: (i) PSI- Hwassa through distribution channel, (ii) Swiss cooperation: Filtu, Somali region, and (iii) Self-help association, women group – Oromia (Arsi), and Woliata. Mela for Her is also piloting direct supply to market approach in Somali region where there is better acceptance in the area. The price of Mela for Her reusable sanitary pad currently is 80 birr per piece for Mela Premium and 40 birr/piece of Mela Basic, the kit is available either in 4pcs or 2pcs per kit. With regard to preference, the company is on piloting, but the assumption is individuals prefer the basic while NGOs prefer the premium type, for price reason. The reusable Mela for Her sanitary pad so far is commonly used in rural areas.

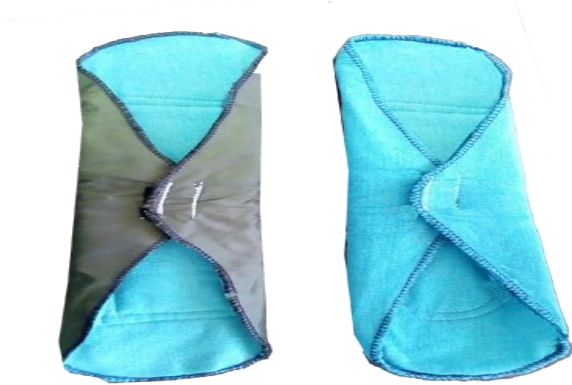
The major challenges for the company include that the company relies on imported production materials and in-country quality production inputs are not available. The demand for reusable sanitary pad is low, and hence currently producing 10,000 pads per month. They are not able to produce at large scale that reduces the price. Awareness level is very low which require more promotion. Though the product is cost effective in terms of its longer time uses, the upfront price is reported to be high. The other most important challenge reported was the devaluation of currency and inflation, which impacted much on the price of the product.

Maryod reusable sanitary pads

Maryod is produced in Ethiopia from cotton and other raw materials procured from the in-country sources. Maryod Sanitary Pads manufacturing company started production in 2010 and currently producing different types of reusable sanitary products such as pad with under pant, pads inside, waterproof outside, with button and with wings. The photo below displays Maryod reusable sanitary pads.

Its key features include:

- It can be used for one year
- It is cost effective
- It is made from cotton which is outsourced from in-country
- Has no irritation (comfortable)
- Environmentally sustainable
- It is a MoH approved standard product



Maryod Sanitary Pads manufacturing company has been primarily working with NGOs. It also works with wholesalers and distributors. Distributors and wholesalers buy sanitary products from the company and supply to NGOs, targeting schoolgirls. The price changes overtime due to the continuous devaluation and inflation. At the time of the study, Maryod pads are sold at ETB 25 per piece before VAT (at company price).

The main challenges identified by Maryod Sanitary Pads manufacturing company includes low level of awareness about the product, which requires strong promotion through partnerships with other organizations. Acceptability is coming gradually due to its partnership with NGOs that supported in the promotion of reusable sanitary pads.

Ham Garment and Training Centre

This company produces reusable sanitary pad called Momypad. It started production twelve years ago, based in Bahir Dar with office in Addis Ababa. It produces different size pads such as small, medium and large size with wings, without wings, with belt and with changeable pads along with pants. According to the company, the most preferred sanitary pad is the one with wings. The price of the product depends on the type and size of the pads, and this ranges between ETB 60 and 72 per piece. Momypad looks like the following.



The company explained that the reusable pads produced are cost effective; fulfil standard set by the MoH (certified by the ministry). It works with NGOs and provides training to start up small enterprises that produces reusable sanitary pad. It provides manual that guides how to use the pad and also how to produce at home. The company's primary partners are international and local NGOs and supplied to Oromia, Amhara, Addis Ababa, SNNPR and

also private actors including the Chambers of Commerce supplying universities, schools and health facilities.

The challenges mentioned by the company includes low quality of the cotton for production which get the colour of the pad faded when washed and needed to standardize the cotton used for production, that is, 75 percent (sourced in-country) and 25 percent linen (imported). The other challenges also relates to delayed payment or cancellation of orders after production of the pads due to various reasons. In order to cope with this challenge, the company now accepts 50 percent advance payment. The other most important problem reported by the company is the frequent power cut that affected the production process.

Table below presents the reusable sanitary products by their key features, as reported by the suppliers, especially the producers.

Table 3. Reusable menstrual products in the market and their key features

No.	Product type	Product features
1	Noble cup	Noble cup is insertable cup made from silicon imported from China. So far 7000 noble cups have been distributed to women and girls. Key features – reused up to 5 years; suitable where there is not adequate water (require less water to clean); free from chemicals; can be worn for up to 12 hours; no odour; no leak; comfortable; as it is personal, can be used without the knowledge of others; and can be used by all women and suitable for any activity. Since the product has not yet introduced to Adama market, the perception of women and girls have not been assessed.
2	Safe pad	Safe pad is reusable sanitary pad produced by Real Relief based in Denmark and imported and distributed by cellular trade (agent) based in Addis Ababa. It is not currently available in the market (be it supermarket or pharmacies or retail shops) as the company targets NGOs to supply in bulk. As it is a new product the company itself stocks on demand, and is on promotion. As it is new, the price has not yet been set (currently distributed on negotiation basis). As the product is not available in the market, the views of the users have not been assessed.
3	Mela for her	It is a reusable sanitary pad produced in Ethiopia. The company started the production in Addis Ababa, a year ago. It produces products of different qualities and characteristics such as Mela premium and Mela Basic. Key features – high quality, durable and can be used for up to 5 years. Waterproof high quality, laminated, comfortable – very slim, less heat and less make noise, attractive appearance, anti-microbial effect, supplied with educational (period tracking and usage guidance) kits in different languages, packaged with linen bags with three different size options. Both products are not in the market, and hence the perception of users has not been assessed.
4	Maryod	A reusable pad produced in Ethiopia from cotton and production materials are sources from in-country. It started in 2010 and currently produces different types such as pad with under pant, pads inside, waterproof outside, with button and with wings. Key features – reused for one year, cost effective, made from cotton (outsourced from in-country), no irritation, environmentally sustainable, MOH approved standard. The product is not common in the market, and hence the perception of users has not been assessed.
5	Ham garment (Momypad)	It is a reusable pad called Momypad. It started before 12 years, in Bahir Dar with office in Addis Ababa. It has different products – small, medium, large size with wings, without wings, with belt, and with changeable pads along with pants. The most preferred one is that with the wings. The price depends

No.	Product type	Product features
		on type and size and ranges from ETB 60 to 72 per piece. The views of women and girls were not assessed as the product has not yet been introduced to the market at Adama and its peripheries.

3.3. Disposable sanitary pads

There are different types of disposable sanitary pads in the market, both imported and locally produced including Always, Comfort, Eve Comfort, Rose, Bella, Michot, Smart, Flexi and Latex, and others. The number of locally produced disposable sanitary pads have increased over recent years which could be owing to tax free raw materials imported for the production which was allowed by the government a year back making the price of local products lower compared to the imported sanitary pads and increased in the market especially urban areas.

The supply of disposable sanitary pads in general goes through producers and/or importers to distributors, wholesalers (located in Merkato in Addis Ababa, and Arada in Adama) and finally to retailers (including shops, pharmacies and supermarkets). The price also varies based on the sources of the product or from whom the retailer receives the product (this could be producer/importer or distributors). If the retailer receives sanitary products directly from the importer or producer, the price is lower and the price increase as they move down the chain to the retailers.

Preference for specific sanitary product depends on the level of the menstrual blood flow, suitability, affordability and accessibility. According to the discussion made with the retailers the demand for sanitary pads is high among the women and girls from the well to do families, and their preference depends on the specific needs. A woman or girl with excessive menstrual flow prefers thick sanitary pads with good absorption capacity to thin pads such as ‘Always pads’. Nevertheless, most women and girls prefer EVE brand of sanitary products mainly because of the fact that they are more promoted and hence dominated their preference, especially girls. With regard to affordability, retailers reported that at the current price only women and girls from the well to do families can buy the sanitary pads to manage their menstruation, whereas women from the poorest and vulnerable households cannot afford the price of disposable sanitary pads.

Despite this women and girls, especially from the poor families, use disposable cloth at home while they prefer using disposable pads at schools and work places or generally when going out for any business. Those women and girls from the well to do families prefer using disposable pads at home and at work places, as they afford to buy the products.

Suppliers and manufacturers reported that the key challenges as those related to accessing/lack of foreign currency, devaluation and inflation; logistic problems such as shortage of containers to import raw materials; issues related to quality as some of them are low quality; there are also forgeries in the market which requires ensuring standard products are only supplied to the market in the country and putting control mechanisms in place to minimize or to control forgeries.

The following are some of the disposable sanitary products available in the market of Addis Ababa and Adama.

Type of sanitary pad	Photo of sanitary product	Type of sanitary pad	Photo of sanitary product
Always		Monalisa	
EVE Comfort		S.Y. Comfort	
EVE Sanitary Napkin		Rose	
Michot			

Preference for the different reusable menstrual products depends on the size of menstrual flow, affordability, fitness and comfort, among others. Those with excessive menstrual flow prefer thick pads like EVE to thin pads like Always. Women and girls coming from poor households prefer sanitary pads with low cost.

3.4. Willingness and ability to pay

The menstrual materials available in the Adama markets and its periphery kebeles can be categorized under the disposable and reusable products. Tampons and cups are not in the market yet, though Noble Cup has been distributed to university girls, as it requires intensive

training and follow up in the early stages of uses. The willing to pay (WTP) was assessed only for the disposable and reusable pads.

The WTP for the sanitary products was assessed based on the survey and focus group discussions. The survey shows that schoolgirls from the well to do families reported that they are willing to pay, on average, ETB37 as one off payment for reusable product supplied through schools while women reported that they can pay, on average ETB 36 as one off payment for their daughter, which is very near to the estimate given by the girls. If this is supplied through retail shops, schoolgirls reported that they are willing to pay ETB44 as one off payment while women reported their willingness to even paying higher amount, which is on average, ETB46.

Regarding the disposable sanitary products, the schoolgirls reported their willingness to pay, on average, ETB22 per month for disposable products supplied through schools and ETB32 per month if supplied by nearby retail shops. Mothers, on the other hand reported their willingness to pay, on average, ETB21 if supplied through school and ETB 34 per month for the disposable materials if supplied through retail shops. Based on the information obtained from the enumerators during the supervision, the price estimates involved assumptions like schools may offer subsidized price while shops may not go down as they are working for profits. Besides, reusable products are one off payments while disposable products require payment every month. Refer chart below for more information.

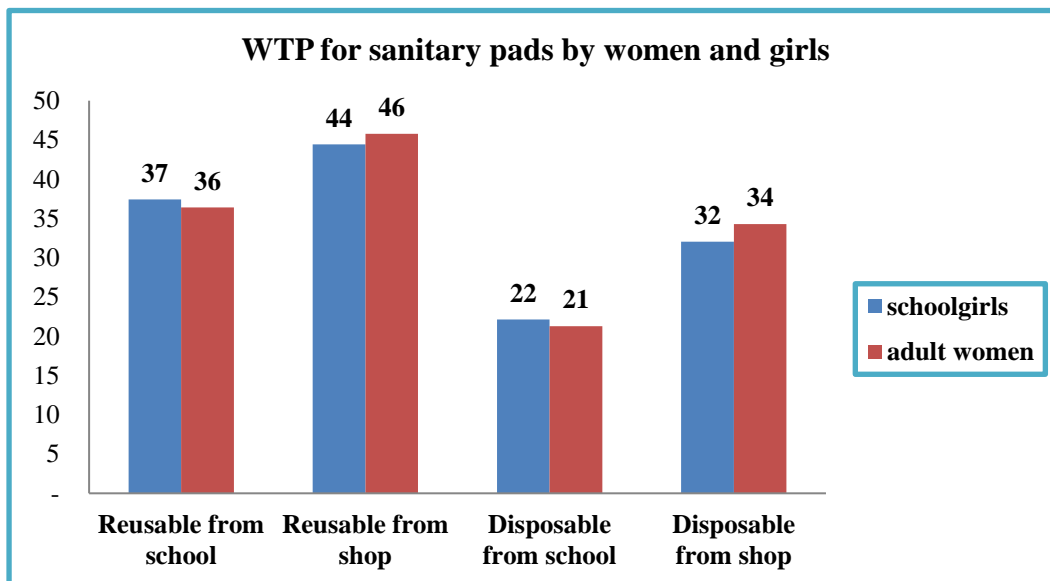


Chart 1. WTP for disposable and reusable sanitary products

Ability to pay / Affordability

Findings from interviews and focus group discussions indicated that at current price of sanitary products, only women and girls coming from the well to do families afford buying and using disposable sanitary materials to manage their menstruation. A study by World Bank (2020) showed that 14.8 percent of the Ethiopian urban population were poor, while in Oromia 15.3 percent of the urban people were living below poverty line. At the time of the study, reusable sanitary pads are not available in the market, but few schools reported that NGOs supplied reusable sanitary materials (e.g. Kobo Luto primary school), which they provided to girls during their menstruation. Assuming reusable sanitary materials like Mella Basic, Mella premium, safe pad, Noble Cup and momypad, the cost per year was calculated to be ETB 8, 16, 60 and 72, respectively, which is affordable for the poor with some level of income.

On the other hand, assuming that women and girls prefer to use disposable sanitary pads to manage their monthly menstruation, affordability by schoolgirls and adult women are analyzed as follows.

If a woman or a girl is on her period, she may need sanitary pads for 3 to 7 days a month. She is expected to change the pads 3-4 times a day. She pays ETB 55 per pack of disposable pads (8-10 pieces). If she changes four times per day, she requires 21 pads for seven days per month, which are nearly two packs of disposable pads. This costs her ETB110 for one woman or girl/month. From the 2007 census survey, the average family size for Adama was nearly 4. If there are 2 females (mother and daughter) per family, the cost per month for only sanitary pad will be ETB220. There are additional costs to fulfil menstrual hygiene materials including the cost of water and intimate hygiene soap for washing genitalia and normal soap for taking bath during menstruation. Considering the additional cost roughly to be ETB1600 per year, the total MHM cost per year will be ETB 4,240. This means that a family with two females spends roughly ETB 4,240 per year, which was reported unaffordable for the poor family living from hand-to-mouth. Considering a woman engaged as daily labourer in a given company, she receives on average ETB150 per day as wage. If she decides to stay at home because she cannot afford disposable sanitary pads, she loses ETB450 to ETB 1050, for missing 3 to 7 days a month. This means that she loses ETB 5,400 to ETB 12,600 per year, which has considerable pressure on her income.

3.5. Benefits and side effects of using pads

Findings from focus group discussions with females indicated that there are benefits and side effects of using disposable sanitary pads, though this varies between girls/women. The benefits of using disposable sanitary pads include among others:

- Schoolgirls, especially those coming from the poorest families, have benefited from the emergency sanitary pads from the school that helped them to continuously attending classes
- Women using disposable sanitary pads reported that they have benefited in terms of managing their menstruation (this helped them to lead dignified life)
- Only in one school, that is, Kobo Luxo primary school, girls reported that they are very happy about the reusable pads provided the school (the school received reusable sanitary pads with pants and soap, provided by a local company called ‘Ke-imba Beteseb’)
- The fact that girls are not taught about menstruation at home and that they unexpectedly see their first menstruation at school usually shock them and put them in shame. Having access to disposable sanitary pad improve their dignity and privacy as well as safety.

The side effects of using disposable sanitary materials reported during the group discussions include among others:

- Some disposable pads have high sense of irritation, not suitable to use
- Some disposable sanitary pads does not fit well
- Some have low absorbing capacity of menstrual blood
- Disposable pads with belt, the belt looses frequently
- Some disposable pads are of low quality and are decomposing

3.6. Stocking or not stocking MHH products

Finding from the interviews with the suppliers at wholesale and retail levels indicated that they are not stocking menstrual products because of the low turnover, which is due to the issues associated with the affordability. Roughly more than half of the women and girls have no sufficient money to buy disposable sanitary products and there is low awareness and supply of reusable pads.

Retail shops selling sanitary products include pharmacies, supermarkets and shops. They stock small quantity of disposable sanitary products that have relatively more turnovers such as Michot, Rose and Eve brand. They are not stocking or selling reusable pads as well as the Noble Cups because the demand has not yet been created on the use and benefits of using the materials. This is even the case for manufacturers of reusable sanitary products, as they are producing stocking based on the orders otherwise companies are not producing.

The fact that the persons at the point of sale could be men or women has also negatively affected the quantity of sales, as women or girls prefer to buy sanitary products from females. This has also been a challenge at schools where the sanitary pads are provided by male teachers.

3.7. Average margin for retailers

Profit margins are based on the prices and hence it differs from one area to the other. Prices also vary based on the supplier to supplier. If retailers receive the product from producer or importer, the price would be lower and the profit margin could be better; but if they receive from wholesaler, the price will be higher, and hence the profit margin would be lower. The price of sanitary products at producer point is reported to lower, then at distributors and at wholesalers. There are disposable sanitary products such as Sassy (ETB43), Private (ETB50-60) are both imported online on addisber.com and Best gir (ETB25) is also sold online on Deliver Addis.

Generally the margin each supply chain actor is making depends on the supplier price and demand on the ground. Most of the retailers reported that they are making margins of 25-30 percent. The margins taken by wholesalers and distributors depend on the bid price, and there is no established rate. Different types of sanitary products have different prices, and the absolute margin is based on the supply price. See diagram below for more information.

Company price: company price is determined based on the cost of production (such as costs of raw materials, personnel, etc) as well as the devaluation of currencies and inflation. e.g. the company sells EVE comfort at ETB735 per box



Distributor price: the price charged by distributors depends on the competition, which means that the profit margin is based on the bid price. E.g. the distributor sells EVE comfort at ETB750 per box (which is 2 percent profit margin - but gain from economies of scale)



Wholesale price: the price at the wholesale is determined based on the competition or based on the negotiation with the buyer. This means that the profit margin depends on the output of negotiation or the bid price (retail price minus 20-30 percent of retail price).



Retail price: the retail price is determined by taking the margin ranging from 25 to 30 percent on the wholesale price.

Chart 2. Summary of the profit margins taken at different levels

4. Conclusion and recommendations

4.1. Conclusion

The market for sanitary products in Adama and its peripheries is gradually growing overtime. At the current market only disposable sanitary pads are marketed and the reusable menstrual pads are directly provided to schools and health care facilities. Women and girls are not fully aware of the different options of sanitary products for use during menstruation. Menstrual cups and tampons are not known in the Adama MHH products markets.

There are more than sixteen wholesalers in Adama that supply disposable sanitary products to the retailers including shops, pharmacies, and supermarkets. There is no fixed partner for the supply of sanitary pads, as the retailers make assessment of the prices and buy from the wholesaler that offer the least price either from Addis Ababa or Adama.

Considering the existing demand for sanitary products, the annual MHH economy in Adama is over ETB153 million. This, however, excludes the economy that could be generated from women and girls living on the street (there are migrants from different corners coming to Adama for work, and these are not considered in the population estimate).

Though there are limitations with the data, the proportion of women and girls having ability and willingness to pay for sanitary product are reported to be high, compared to those who have the capacity to pay.

In some schools like Ababo, girls coming from the poorest families are identified and supported in terms of increasing their access to sanitary pads from school, which is a good initiative and hence needs to be supported to increase coverage. In most of the schools visited during the assessment there is access to emergency sanitary pads if the menstruation comes while they are in the school (but in most cases limited to one pad per girl). In periphery schools like Dhaka Adi and Makuye Primary Schools, there is no access to sanitary pads and others associated with MHM.

Schoolgirls reported that access to sanitary products benefited them in terms of increasing their school attendance, ensuring privacy and dignity as well as improving their psychological emotions.

Schoolgirls, however, reported that there are side effects in using some disposable sanitary pads, which among others include: irritation, frequent loose of belt, unfitness, poor absorbability, and decomposing. These side effects needs to be communicated with the companies supply the sanitary products.

Generally, the trend shows that in recent years there is an increase in number of availability of different types of both imported and locally produced both reusable MHM products, though the challenge remains in reaching out to the neediest women and girls, and quality related issues. This requires more intervention in terms of quality control and increasing access to MHM products to the less to afford group of the women and girls.

The government support and emphasis on MHM has brought various changes such making tax free for raw materials importation for both reusable and disposable MHM products, which are very commendable and have, encourage more local production. In addition, setting up MHM taskforce federal and regional, standard and guideline for sanitary products and facility design has been developed

There have been initiatives supporting small enterprise to engage in reusable sanitary pads, however, sustainability has been a problem due issues related to raw materials, credit linkage, lack of market chain, and awareness gap in the community. In this regard, further work has been done other stakeholders to address the gaps.

Suppliers and manufacturers are facing challenges related to accessing foreign currency, devaluation and inflation, which increases the price of sanitary materials causing non-affordability by the lower income groups. In addition logistic problems like shortage of containers to import raw materials and issues related to the quality are identified as challenges. Besides, availability forgeries in the market are reported as a challenge.

4.2. Recommendations

Based on the findings from this assessment the following recommendations are given to improve the supply chain for sanitary products.

- Relevant government body (ministry of health) needs to work on standardization of sanitary products to distinct forgeries and avoid low quality products entering the markets.
- The government should also facilitate easy access to foreign currencies for importers of sanitary products and importers of raw materials for local manufacturing to increase market supply.
- Affordability is one the biggest challenges in the supply of sanitary products and reaches out to women and girls. The high costs of sanitary products are related to the devaluation of currencies, inflation and government tax. Therefore, the government should exempt taxation of the MHH product business to ensure wider coverage of the poorest women and girls.
- Lack of menstrual health and hygiene services in school is equivalent to saying girls ‘do not go to school’, which potentially affect the right of girls and impact negatively on their livelihoods. Even if they go to school, they are forced to miss classes 3-5 days a month, which significantly affect their education. Hence, sufficient attention should be given to menstrual health and hygiene management in schools including allocating specific budget to menstrual health and hygiene related activities.
- The reusable pads, especially those cost effective ones, are not available in the market at the time of this study. This was mainly because of the low level of awareness among the women and girls. Reusable sanitary products are distributed through NGOs for schools and health care facilities. The government and relevant development partners should strongly promote reusable sanitary products aiming at creating sufficient demand for the gradually growing market.
- The Ethiopian Standards Agency should also be involved to come up with standards on the disposal of pads, that is, compostability, incineration and so on. This can be built up on the disposal mechanisms indicated in the national MHM policy and implementation guideline.
- The assessment also found out that there are some weak sides of disposable sanitary pads as reported by schoolgirls. Some of these include poor absorbability, decomposing, frequent loose of belt and irritation. The companies producing those specific products need to work on the gaps in collaboration with the Ethiopian Standard Agency and come up with the improved sanitary products to the market.

- In order to increase the demand for the supply of disposable sanitary products and increase access of poor women and girls, there should be activities related to women’s economic empowerment like income generating activities.
- At the time of the assessment companies manufacturing reusable and disposable sanitary products are not operating at their full capacity mainly because of the low demand and hence the low turnover. Working on the demand side is critical to improve wider supply of sanitary products.
- All retailers visited in Adama during the study reported that they are not interested to stock sanitary products due to the low turnover. Working on the demand side, on the one hand, and on economic empowerment on the will help in activating the markets for sanitary products.

Annex 1. Lists of companies visited

No.	Company name (Addis Ababa)	Sanitary product type	Contact
1	Noble Cup	Noble Cup	0944182356
2	Real Relief	Safe pads	0912003516
3	Mella for Her	Mella Premium; Mella Basic	0911643977
4	Amtsel F.F & V. Manufacturing PLC	Maryod reusable sanitary pads	0910699020
5	Ham Garment & Training Centre	Momypad	0918712323
6	G.P.Y Sanitary Products Manufacturing	EVE comfort	0912614333
7	UNICEF (Kalkidan)	-	0911918727
8	Eve Sanitary product manufacturing	Eve brands	0911918727
9	Samir cosmetics wholesalers	Smart sanitary napkin, EVE sanitary napkin, EVE Panty liner	
10	Nassir Cosmetics wholesalers	Michot sanitary pads	0911523035
11	Kale Drug and Medical Supplies wholesale PLC	Do not stock sanitary pads as there is no turnover, but does it on auction	0937629454
12	Adama Medicine and Medical Supplies wholesale	Do not stock sanitary pads as there is no turnover, but does it on auction	0917797415
13	Fentale Medicine and Medical Supplies wholesale	Do not stock sanitary pads as there is no turnover, but does it on auction	0911766499
14	Efnan Human Medicine and Medical Supplies wholesale	Do not stock sanitary pads as there is no turnover, but does it on auction	0945585590
15	Sunform Human Medicine and Medical Supplies wholesale	Do not stock sanitary pads as there is no turnover, but does it on auction	0910398039
16	Awash Human Medicine and Medical Supplies wholesale	Do not stock sanitary pads as there is no turnover, but does it on auction	0930292524
	Sanitary product retailers		
17	Geda Pharmacy	EVE brands, smart	0913574330
18	Dureti Pharmacy	EVE brand, smart, Rose, Always, Flex	0911363942
19	Heran Pharmacy	EVE brand, smart, michot, Latex, Always	0911933924
20	Zumar Pharmacy	EVE brand, michot, Rose	0911842189
21	Bilal Pharmacy	EVE brand, Bella, Flex	
22	Chafé Pharmacy	EVE brand, Rose	0962102739

23	Adama Hospital Public Pharmacy	Provide only for the hospital	0913347233
24	Yoni Mini Market	EVE brand, Rose, michot	0942122671
25	Dana International Trading PLC	Now these two reported stopping production due to foreign currency shortage	0911235060
26	Ethio Hygiene Industries		0911205523
27	Samira Asbeza Retail shop	-	0926774129
28	Mukemir Retail shop	-	0922357269

Annex 2. Data collection tools

FGD Guide for Women/Girls Checklist to Use for Facilitation

1. Which sanitary product you know and use for managing menstruation?

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2. What are the advantages and disadvantages of using the sanitary products to manage menstruation? (perceived advantages and disadvantages)

Sanitary product used	Perceived advantages	Perceived disadvantages

3. Which sanitary product do you prefer? Why?

Preferred sanitary product	Reasons for preference

4. Which sanitary product you dislike? Why?

Disliked sanitary product	Reasons for the dislike

KII Guide for Retailers
For shops, supermarkets, pharmacies

1. Which sanitary product you sell? Who are your customers?

Type of sanitary product they sell	Customers (women, girls, etc)

2. From whom you buy sanitary products? Where are they located?

Suppliers/distributors	Where are they located?

3. Do you stock sanitary products? If no, why? If yes, how?

Do you stock sanitary product?	If yes, how?	If no, why?

4. What is the average margin you make from selling sanitary products?

5. Are there any challenges related to the sanitary product business? If yes, please explain.

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6. What kind of support you propose to run your sanitary product business?

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In-Depth Interview Guide for Supply Chain Actors

[For manufacturers/importers, distributors, wholesalers]

- ✓ Which sanitary products you manufacture/import/distribute, wholesale/retail? [List the sanitary products your company do business on]

Sanitary products supplied	
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- ✓ What are the key features of the sanitary products you manufacture/import/distribute, or wholesale/retail? [How your sanitary products differ from other suppliers?]

Sanitary product supplied	Key features that distinguish your products

- ✓ Which are the primary partners for your sanitary products?

Primary partners (directly buying from your company)	Secondary partners (buying from your primary partners)	Tertiary partners (buying from your secondary partners)

- ✓ Which sanitary product is the most preferred by your primary partners? Why?

Sanitary product most preferred	Reasons for preference

- ✓ What is the price for each of your sanitary product by type? (disposable, reusable, tampons, menstrual cups)

Sanitary product type	Price charged per piece (ETB)

- ✓ Is there any complain on the quality or friendliness of your sanitary products by women and girls? If yes, please explain.

Sanitary product	Complain reported

- ✓ Is there any challenge from your side?