

A Market-Based Approach to Menstrual Health

WTO Informal Working Group on MSMEs

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Half the world's population menstruates
for 35 years of their life



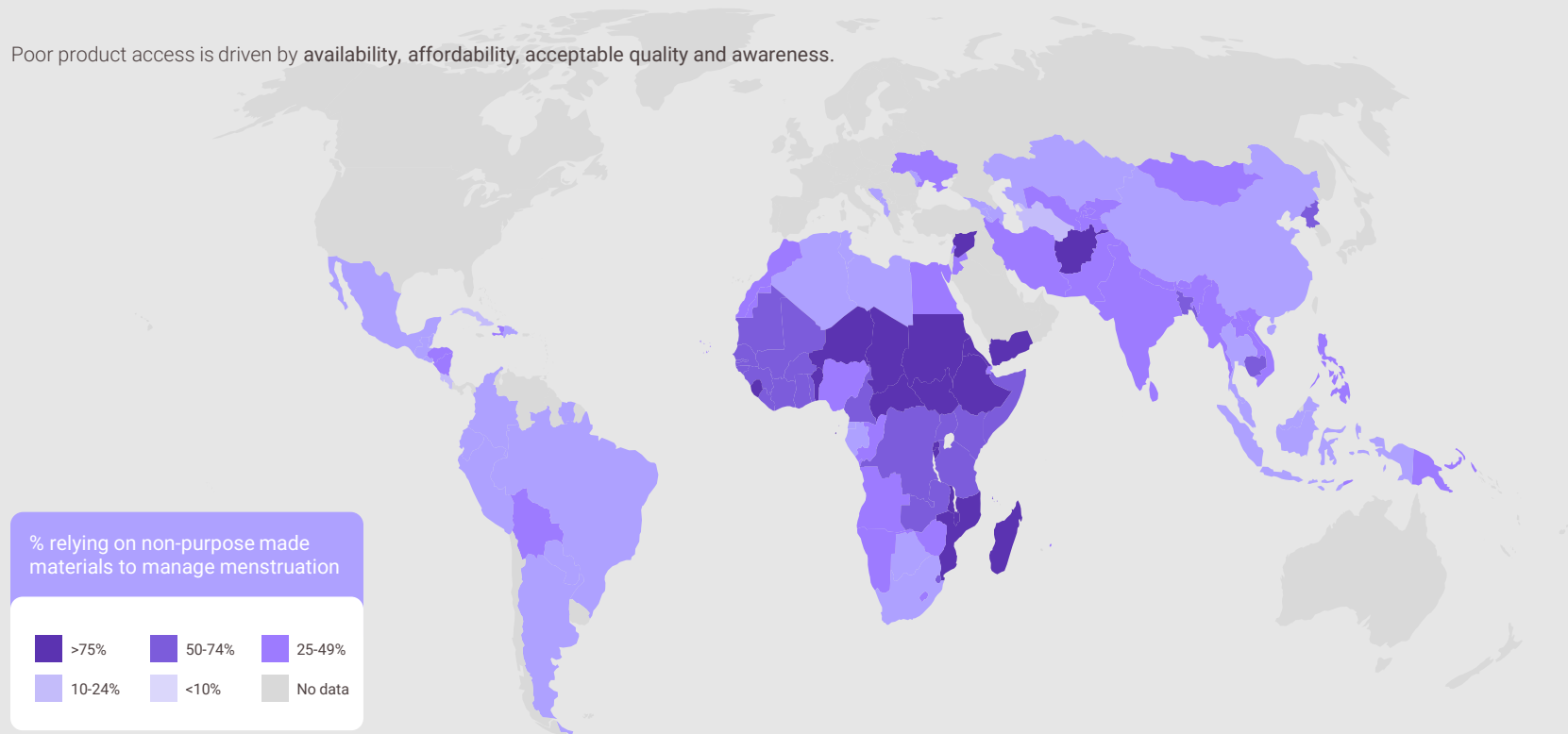
613 million

**Women and girls
across LMICs**

rely on non-purpose made materials to
manage menstruation

Across LMICs 1 in 3 women and girls rely on non-purpose made menstrual materials

Poor product access is driven by availability, affordability, acceptable quality and awareness.



Sources: 1. Reproductive Health Supplies Coalition (2024), Menstrual Hygiene Landscape for selected countries





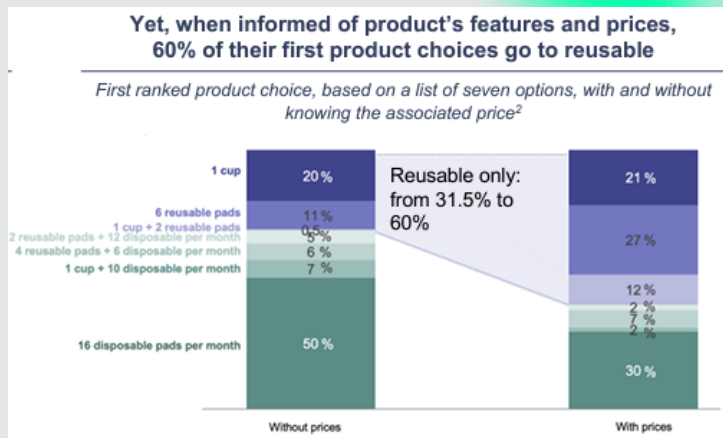
Commercially available products are too expensive

At an average cost of \$23 per user per year, these products are out of reach for this share of the population.



Innovations offer a solution but are not available on local markets.

- Up to 15x lower cost across the product lifetime
- Improved function, ease of use and reduced environmental impact.
- Provide choice based on needs and preferences.
- Growing adoption in High Income Countries (HICs).



*Hystra (2023)

800 million

People across LMICs are willing and able to pay for reusable menstrual products.



REMOVING MARKET BARRIERS, SCALING *PRODUCT* *ACCESS*

Market barriers to access:

- Absence of product standards - a barrier for menstrual product companies to access markets and enhance quality.
- Restrictive regulations - taxes, levies and fees that increase product costs.
- Lack of viable business models - that can make menstrual products available and drive demand at scale.
- Limited financing - limited public funding, and private financing and investment in the sector due to the lack of investment opportunities



THE WORLD NEEDS A DIFFERENT APPROACH

One that empowers every women and every girl to buy a quality product she wants to use and can afford.



A MARKET with POTENTIAL

By 2035, the total number of people who menstruate in LMICs is projected to grow by 161 million (9%).

- An annual **market of USD 28 billion** in LMICs.
- Affecting the **youngest populations in the world**, with most menstruating years ahead of them.
- A significant share of **first-time users expected to enter the market** by 2030.
- Expected high relative **increase in purchasing power**



Capital M Success Pathway

A phased approach to target the most pressing barriers and unlock market growth

This requires a public funding strategy with targeted interventions and the involvement of four key stakeholders: funders, governments, private sector and technical stakeholders.

Market Enablers

Understand market actors and market maturity; remove structural barriers; enable menstrual health market growth.

- **Promote wide-scale adoption of menstrual product standards**
- Address **taxes, levies and fees** on menstrual products
- Support **government policy and regulatory reforms** to assist market development
- Conduct **diagnostics and market maturity analysis**
- **Engage in global menstrual health market development**

Private Sector Capacity

Support the private sector and connect solutions with the greatest potential to opportunities for scale.

- Support enterprises across the value chain **to access consumer markets**
- **Track funding and financing needs** of MH enterprises; including for volume and scale
- Collaborate to **raise consumer awareness and education** on products and related services

Access to Finance

Leverage partners as investors and risk mitigators to unlock capital and private finance for scalable menstrual health enterprises.

- **Facilitate partner-led access** to financing and capital
- Engage partners to **de-risk, incentivise and leverage** financing and investment
- **Curate list of MH market actors** to avail market opportunities to financing and investment partners

ISO Standards for Menstrual Products



Improving Global MH Market Data

Trade data from customs authorities as global data source for menstrual product use and access gap

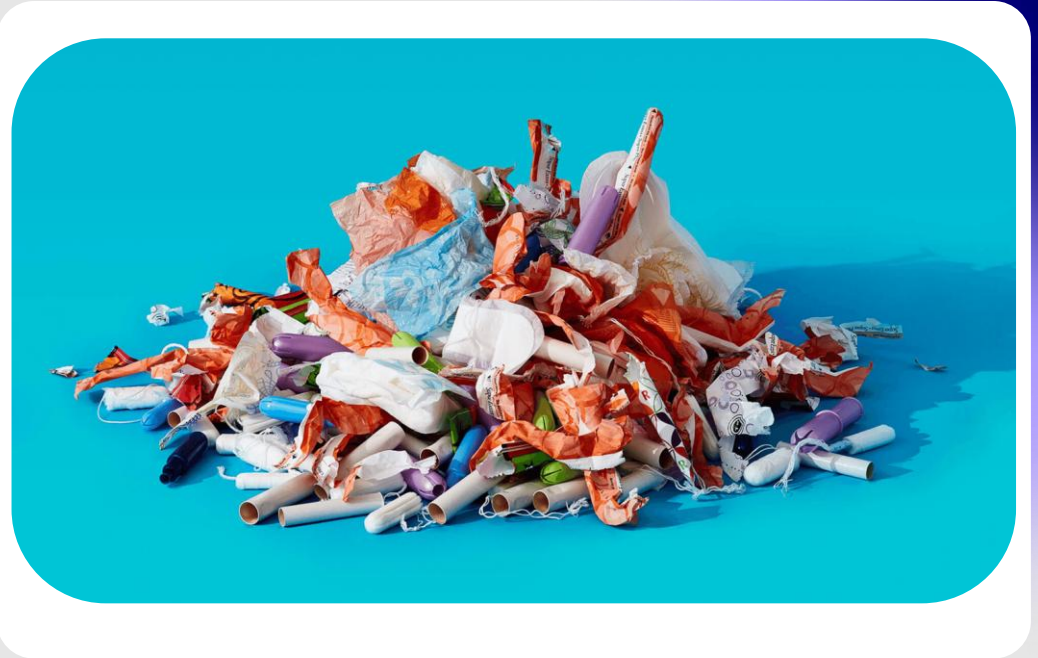
No separate categories of HS Codes exist for menstrual products.

Opportunity to change HS Codes with the World Customs Organization.

Partners Involved:



Global Affairs
Canada





**For more information on
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