Family Planning Market Report

DECEMBER 2020

CLINTON HEALTH ACCESS INITIATIVE

Reproductive Health SUPPLIES COALITION

Each annual edition of the Market Survey report stands alone. The evolution in data sources and other factors does not allow for year to year comparisons based on individual reports. Please consult the most recent version of the Market Survey for the most accurate longitudinal assessment of the market for contraceptive supplies.

The scope of the 2020 Family Planning Market Report comprises the total FP2020 public-sector market – defined as volumes purchased by institutional buyers (USAID, UNFPA, Social Marketing Organizations, etc.) and Ministry of Health (MOH) or government-affiliated procurers for the 69 FP2020 focus countries.[1] The report covers all product-based modern contraceptive methods and leverages historical supplier-reported shipment data collected from 16 suppliers[2] for female condoms, implants, injectables, IUDs[3], orals (combined and progestin only), and emergency oral contraceptives. Findings for male condoms are based on data from the Reproductive Health Interchange (RHI).[4] Supplier-reported data provides insights into historical procurement of contraceptive products, but is not necessarily equivalent to demand for contraceptives, given procurement is impacted by constraints including available funding and production capacity.

FROM 2018 TO 2019, THE VALUE OF THE FP2020 PUBLIC-SECTOR MARKET REMAINED LARGELY STABLE ALTHOUGH DECREASES IN VOLUMES AND COUPLE-YEARS OF PROTECTION (CYPS) SHIPPED[5] WERE OBSERVED.

THESE DECREASES WERE PRIMARILY DRIVEN BY A DECLINE IN IUD AND INJECTABLE VOLUMES BUT WERE PARTLY OFFSET BY INCREASES IN THE VOLUMES OF OTHER METHODS, SUCH AS IMPLANTS, ORALS, AND CONDOMS. THE VALUE OF THE PUBLIC-SECTOR IMPLANT MARKET IN FP2020 COUNTRIES INCREASED DUE TO HIGHER VOLUMES EVEN AS AVERAGE PRICES DECREASED. SIMILAR TO 2018, LONG-ACTING REVERSIBLE METHODS OF CONTRACEPTION (IMPLANTS AND IUDS) COMPRISED ABOUT TWO THIRDS OF CYPS SHIPPED TO THE FP2020 PUBLIC-SECTOR MARKET IN 2019.

WHILE THE OVERALL MARKET VALUE IN 2019 REMAINS HIGHER THAN THE HISTORIC LOWS OBSERVED IN 2016 AND 2017, IT HAS NOT REBOUNDED TO THE LEVEL OBSERVED IN 2015.

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1. Defined as countries with a 2010 gross national income per capita less than or equal to $2,500.
2. Participating suppliers represent >97 percent of cumulative volumes within each method in the Reproductive Health Interchange (RHI) database from 2015 to 2019, with the exception of IUDs and emergency contraceptives, which represent 40-70 percent; see Appendix C.1 for further details. Additionally, the total cumulative volumes in the Market Report were greater than the total cumulative volumes seen in RHI for each method from 2015-2019; see Appendix C.5 for further details.
3. IUD is an abbreviation for an intra-uterine device; all IUD quantities shown in this report refer to copper IUDs. Data collection for this year's report did include the hormonal IUS, and Medicines360, a supplier of the hormonal IUS, was added to the Market Report as a participating supplier. However, a public price for hormonal IUS was not available in the UNFPA Contraceptive Price Indicator (which is used as the source of publicly-available pricing information in this report) for 2019 and therefore hormonal IUS volumes are not included in this year's report. Data from suppliers of the hormonal IUS will be included in future Market Reports once price points become publicly available and data can be aggregated accordingly.
4. For male condoms, RHI has historically provided greater coverage of the market compared to supplier shipment data.
5. Couple-Years of Protection (CYP) is the estimated protection provided by contraceptive methods during a one-year period (e.g. 120 condoms provide a couple protection for one year). See Appendix C for further details.

This section analyzes trends in shipment volumes, value in USD, and CYPs shipped in the FP2020 public-sector market from 2015 to 2019.

Notable Market Trends

Although relatively stable between 2018 and 2019, the total value of the public-sector market in the 69 FP2020 focus countries decreased over the five-year period in scope for this report from $269 million[6] in 2015 to $223 million in 2019 (Exhibit 1). Relative increases and decreases in market value have been observed throughout that period with the 2017 $187 million market value being the lowest point recorded during the 2015-2019 period (Exhibit 1). The market value recovered partially in 2018, reaching $226 million, and remained roughly flat in 2019 at $223 million (Exhibit 1).

While the value of the public-sector market in the 69 FP2020 focus countries has remained stable with a slight 2 percent decrease between 2018 and 2019, a more significant 13 percent decline was observed with regard to CYPs shipped during that same period (Exhibit 3). The decrease in CYPs shipped in 2019 relative to 2018 was largely driven by a decline in IUD CYPs, which was partially offset by an increase in implant CYPs from 2018 to 2019. Accordingly, IUDs and implants—the long-acting reversible contraceptives (LARCs) included in the method mix—continued to comprise about two-thirds of the CYP mix relative to short-acting methods in 2019 (Exhibit 5), although LARCs only comprised 43 percent of market value in 2019 due to their low cost per CYP (Exhibit 6).

From 2015 to 2019, Sub-Saharan Africa's market share grew from 60 percent to 72 percent of the FP2020 public-sector market captured in this report[7] (Exhibit 7). This growth has corresponded with a decrease in Asia's market share. Within the FP2020 public-sector market, the 10 largest countries (in terms of market value) continued to represent over 50 percent of the total market value in 2019, as they did in 2018 (Exhibit 9). While the list of top 10 markets has changed from year to year, five countries —Bangladesh, Ethiopia, Nigeria, Uganda, and Zimbabwe — have consistently appeared in the top 10 markets from 2015 to 2019.

Notable Product Trends

2019 IUD volumes declined by 30 percent compared to 2018 levels (Exhibit 2) causing a small decrease in the overall market value in 2019 since IUDs have a lower unit cost relative to other methods (Exhibit 4). Conversely, since the IUD has the highest CYP per unit of any method in this report, the decrease contributed the most to the decline in CYPs shipped from 2018 to 2019 (Exhibits 4, 3). The decline was largely driven by a return to pre-2018 levels of procurement in Egypt and India, which received significant spikes in volumes in 2018, indicating that the cyclical nature of country-level procurement may have impacted IUD volume increases from 2017 to 2018 and the decline from 2018 to 2019.

The market value of injectables decreased by $12 million (19 percent) in 2019, which constituted the largest decrease in market value for any product category (Exhibit 1). Production constraints for injectables affected supply availability throughout 2019 and contributed to comparatively lower injectable volumes, CYPs shipped, and market value in 2019 versus 2018. The cyclical nature of procurement may have also contributed to some of the decline seen in 2019. For example, procurement of injectables decreased substantially in Bangladesh after large injectable volumes were procured in 2018. Even after discounting the large decline in volumes from Bangladesh however, decreases were still observed across the injectables category.

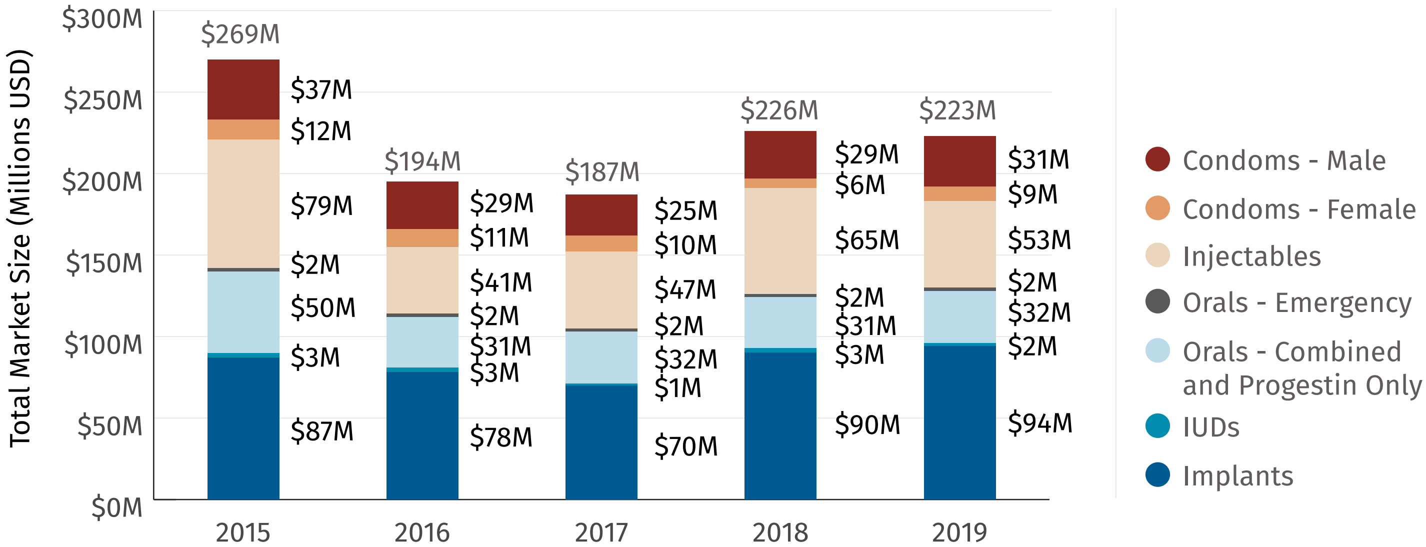
Decreases in the IUD and injectables categories were offset by increases in market value for implants, orals, and male and female condoms. Implants comprised 31 percent of all CYPs shipped in 2019, up from 26 percent in 2018 (Exhibit 5). In 2019, as per the UNFPA Contraceptive Price Indicator, unit prices for implants also fell to an average of $8.367[8] from $8.50 in 2018 due to the increased number of quality-assured implant suppliers on the market, signaling that more implants could now be procured with the same amount of funding.

6. All currency reported is in US dollars, unless otherwise noted.

7. Private-sector contraceptive use does not factor into these market share numbers. Additionally, although participating suppliers account for 97 percent of cumulative volumes in RHI, some procurement from domestic suppliers in markets like Bangladesh and India (among others) may not be captured in the shipment data from participating suppliers. Accordingly, it should be noted that market share estimates are based only on available shipment data from participating suppliers. For more detailed information on the Bangladeshi and Indian markets, please refer to Appendix E.

8. Note the $8.367 figure is a weighted average of all implant procurement tracked in the UNFPA Contraceptive Price Indicator (Exhibit 4). As the UNFPA Contraceptive Price Indicator does not break out price by 3-year and 5-year implants, the $8.50 IAP price is used in Exhibit 4 for illustrative cost per CYP calculations. The 2019 UNFPA Contraceptive Price Indicator is available here: https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptive_Price_Indicators_2019_V2_-_EXTERNAL.pdf

EXHIBIT 1: VALUE OF THE FP2020 PUBLIC-SECTOR MARKET (USD)



METHOD	YEAR OVER YEAR 2018-2019	COMPOUND ANNUAL GROWTH RATE 2015-2019
Condoms- Female	41%	-8%
Condoms- Male	8%	-4%
Implants	5%	2%
Injectables	-19%	-10%
IUDs	-30%	-6%
Orals- Combined & Progestin Only	2%	-11%
Orals- Emergency	34%	-1%
Total	**-2%**	**-5%**

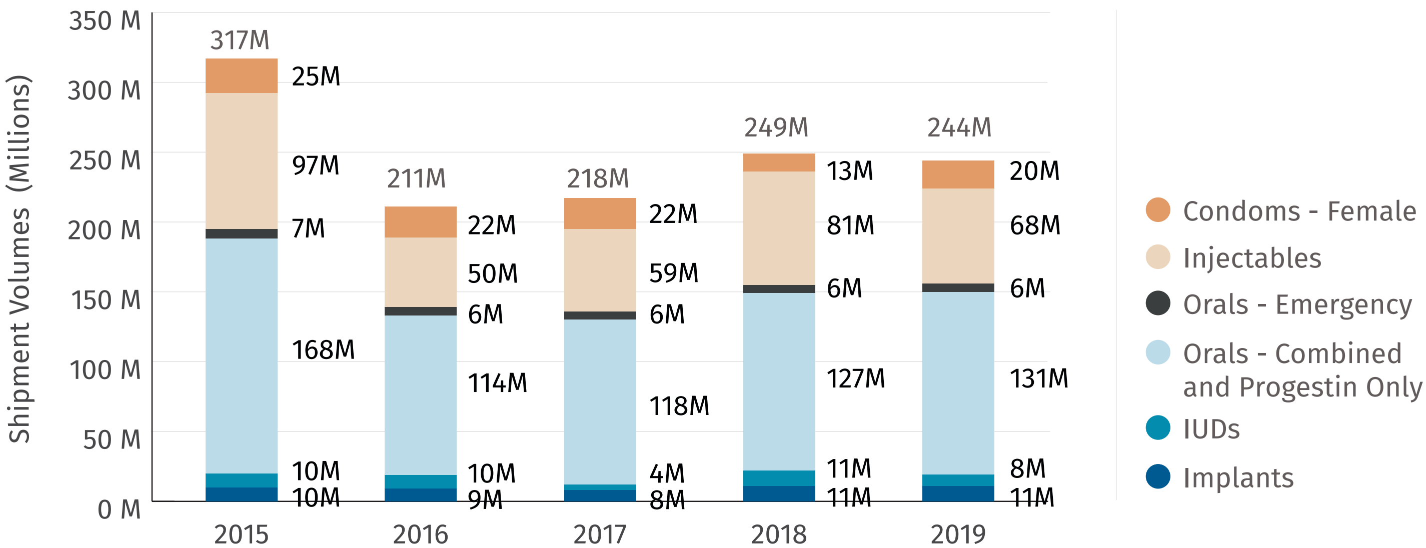
Year over year (YOY): change in the value of the FP2020 public-sector market between 2018-19

Compound Annual Growth Rate (CAGR): [(final value/beginning value)^ (1/number of years)]-1

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Year over year and compound annual growth rate numbers were calculated throughout the report using actual values, not the rounded values in the chart.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020; [3] UNFPA Contraceptive Price Indicator, 2015–2019; [4] IAP Implant Price

EXHIBIT 2: TOTAL FP2020 MARKET VOLUMES (MALE CONDOMS EXCLUDED)*



METHOD	YEAR OVER YEAR 2018-2019	COMPOUND ANNUAL GROWTH RATE 2015-2019
Condoms- Female	51%	-5%
Implants	6%	2%
Injectables	-16%	-8%
IUDs	-30%	-7%
Orals- Combined & Progestin Only	3%	-6%
Orals- Emergency	-8%	-3%
Total	**-2%**	**-6%**

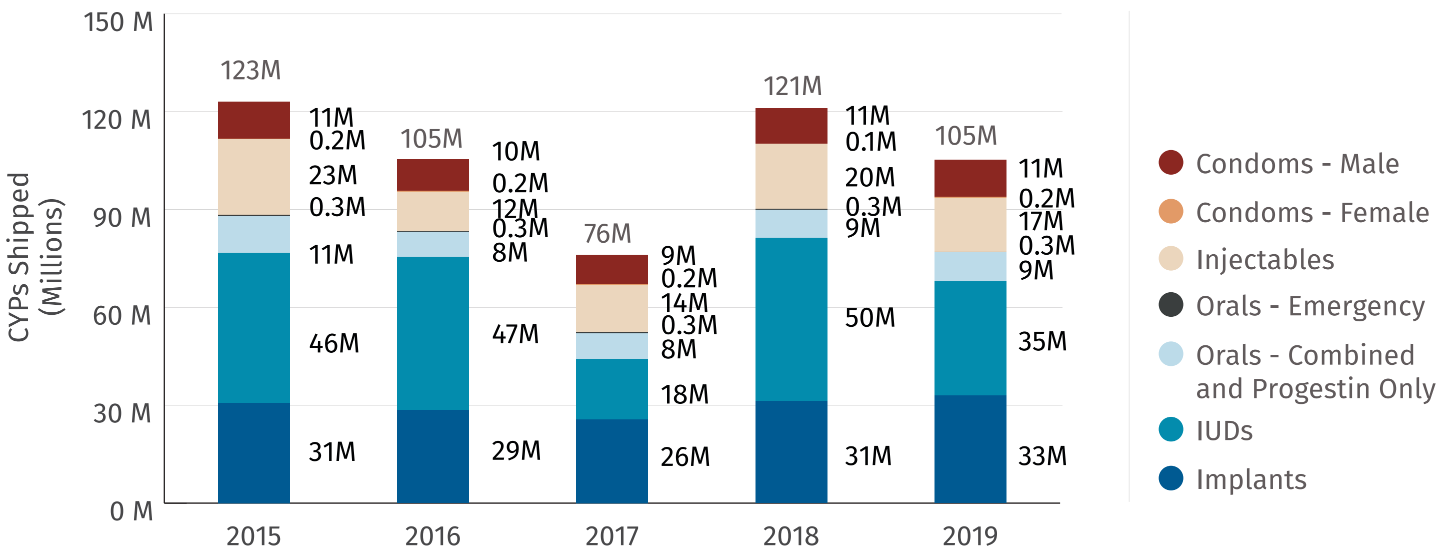
MALE CONDOM SHIPMENT VOLUMES (BILLIONS)						
2015	2016	2017	2018	2019	YEAR OVER YEAR 2018-2019**	COMPOUND ANNUAL GROWTH RATE 2015-2019
1.35B	1.15B	1.09B	1.30B	1.36B	5%	0%

*Male condoms are shown separately because the source of the shipment data is RHI whereas all other methods are supplier-reported. See Appendix C for further details.

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Year over year and compound annual growth rate values were calculated using actual, not rounded, numbers.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020

EXHIBIT 3: CYPs SHIPPED TO THE FP2020 PUBLIC-SECTOR MARKET



METHOD	YEAR OVER YEAR 2018-2019	COMPOUND ANNUAL GROWTH RATE 2015-2019
Condoms- Female	51%	-5%
Condoms- Male	5%	0%
Implants	5%	2%
Injectables	-17%	-8%
IUDs	-30%	-7%
Orals- Combined & Progestin Only	4%	-6%
Orals- Emergency	-8%	-3%
Total	**-13%**	**-4%**

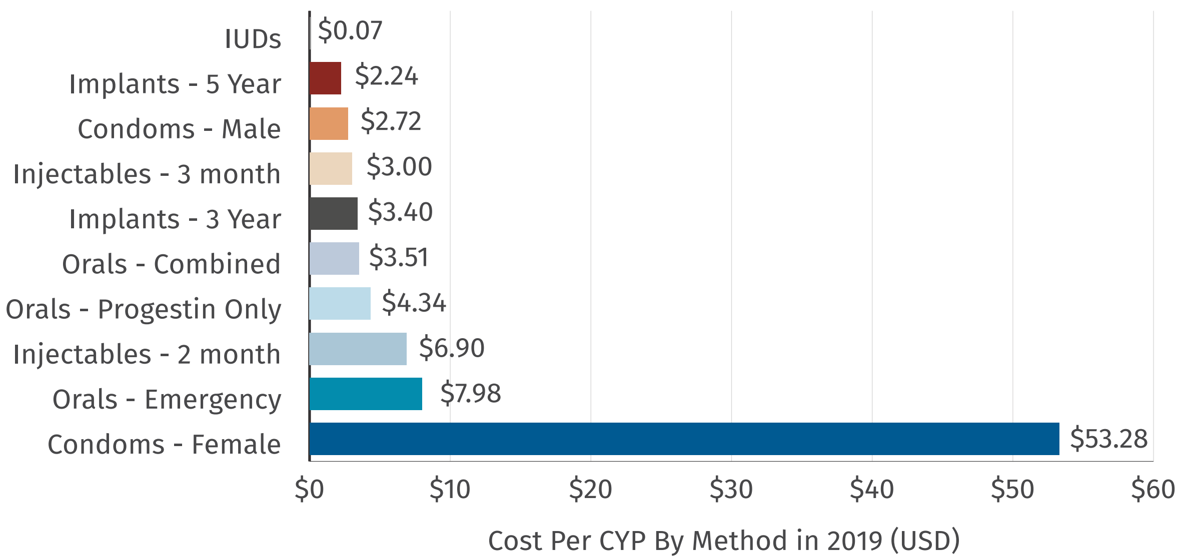
Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Year over year and compound annual growth rate values were calculated using actual, not rounded, numbers.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020; [3] USAID, "Couple-Years of Protection (CYP)"

EXHIBIT 4: COST PER CYP BY METHOD PER DURATION OF USE (USD)

METHOD	UNITS PER CYP	UNIT COST					COST PER CYP				
		2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Condoms - Female	120.00	$0.49	$0.49	$0.46	$0.47	$0.44	$58.80	$59.28	$55.32	$56.88	$53.28
Condoms - Male	120.00	$0.03	$0.03	$0.02	$0.02	$0.02	$3.24	$3.03	$2.71	$2.64	$2.72
Injectables - 1 month	13.00	$0.85	$0.85	$0.85	$0.85	N/A	$11.05	$11.05	$11.05	$11.05	N/A
Injectables - 2 month	6.00	$1.15	$1.15	$1.15	$1.15	$1.15	$6.90	$6.90	$6.90	$6.90	$6.90
Injectables - 3 month	4.00	$0.78	$0.80	$0.77	$0.79	$0.75	$3.13	$3.20	$3.09	$3.16	$3.00
Orals - Combined	15.00	$0.29	$0.26	$0.27	$0.24	$0.23	$4.35	$3.95	$4.01	$3.56	$3.51
Orals - Progestin Only	15.00	$0.34	$0.33	$0.32	$0.29	$0.29	$5.10	$4.92	$4.76	$4.40	$4.34
Orals - Emergency	20.00	$0.37	$0.35	$0.26	$0.28	$0.40	$7.40	$7.02	$5.14	$5.52	$7.98
Implants - 3 Year	0.40	$8.50	$8.50	$8.50	$8.50	$8.50	$3.40	$3.40	$3.40	$3.40	$3.40
Implants - 5 Year	0.26	$8.50	$8.50	$8.50	$8.50	$8.50	$2.24	$2.24	$2.24	$2.24	$2.24
IUDs	0.22	$0.30	$0.30	$0.31	$0.30	$0.31	$0.07	$0.06	$0.07	$0.07	$0.07

N/A indicates method was not listed on the UNFPA Contraceptive Price Indicator in 2019. Implant pricing in this exhibit was taken from the IAP implant price.



Sources: [1] UNFPA Contraceptive Price Indicator, 2015–2019; [2] USAID, "Couple-Years of Protection (CYP)", [3] IAP Implant Price

EXHIBIT 5: CYP MIX (IN TERMS OF CYPS SHIPPED) OF THE FP2020 PUBLIC-SECTOR MARKET

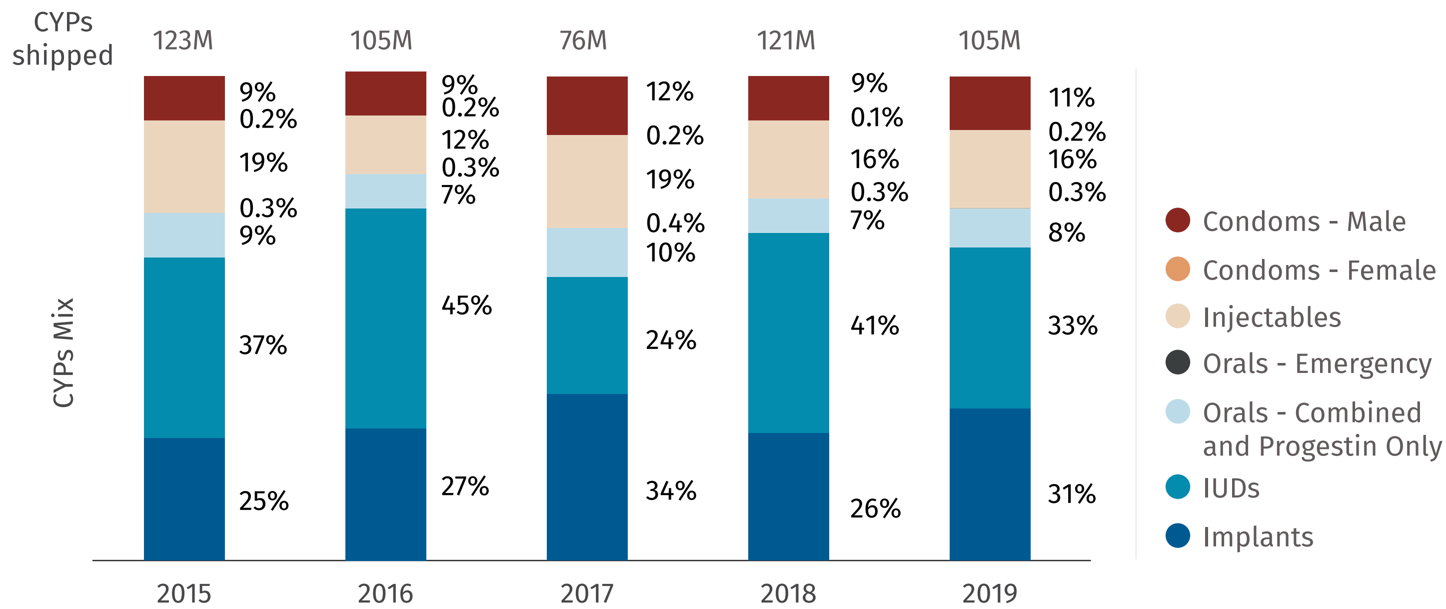
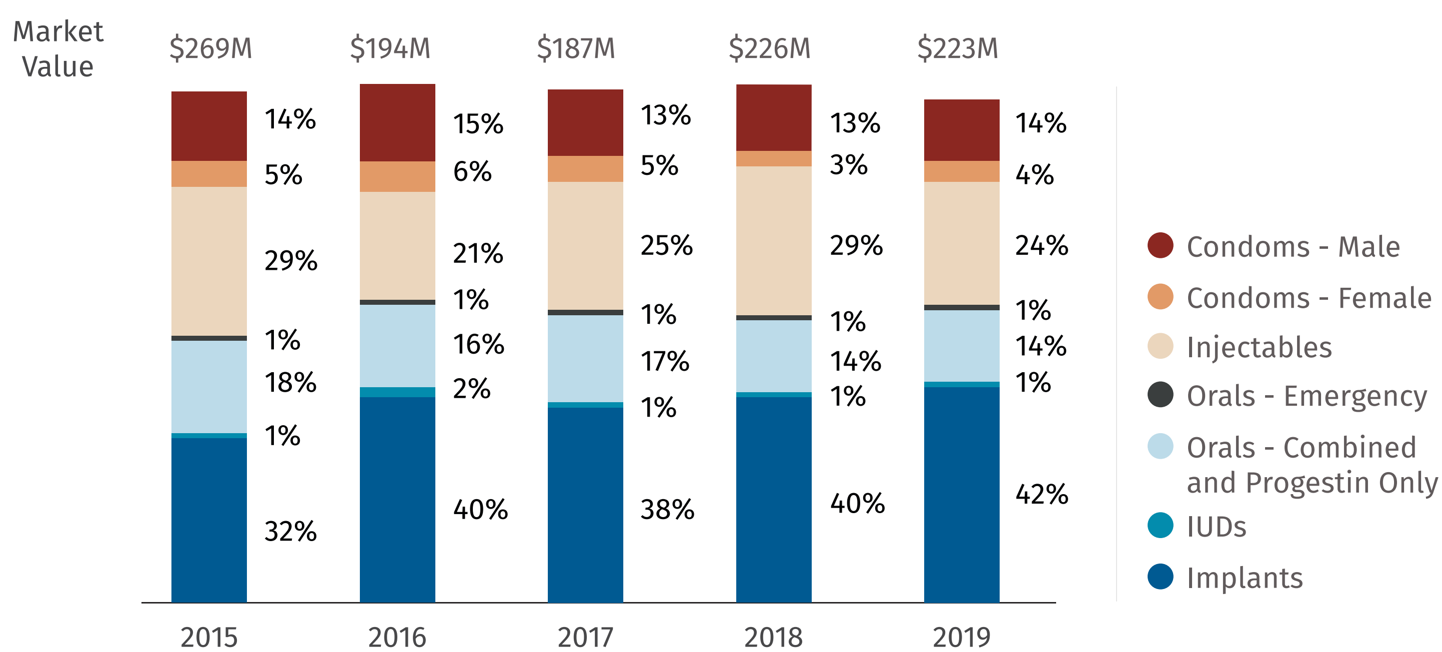


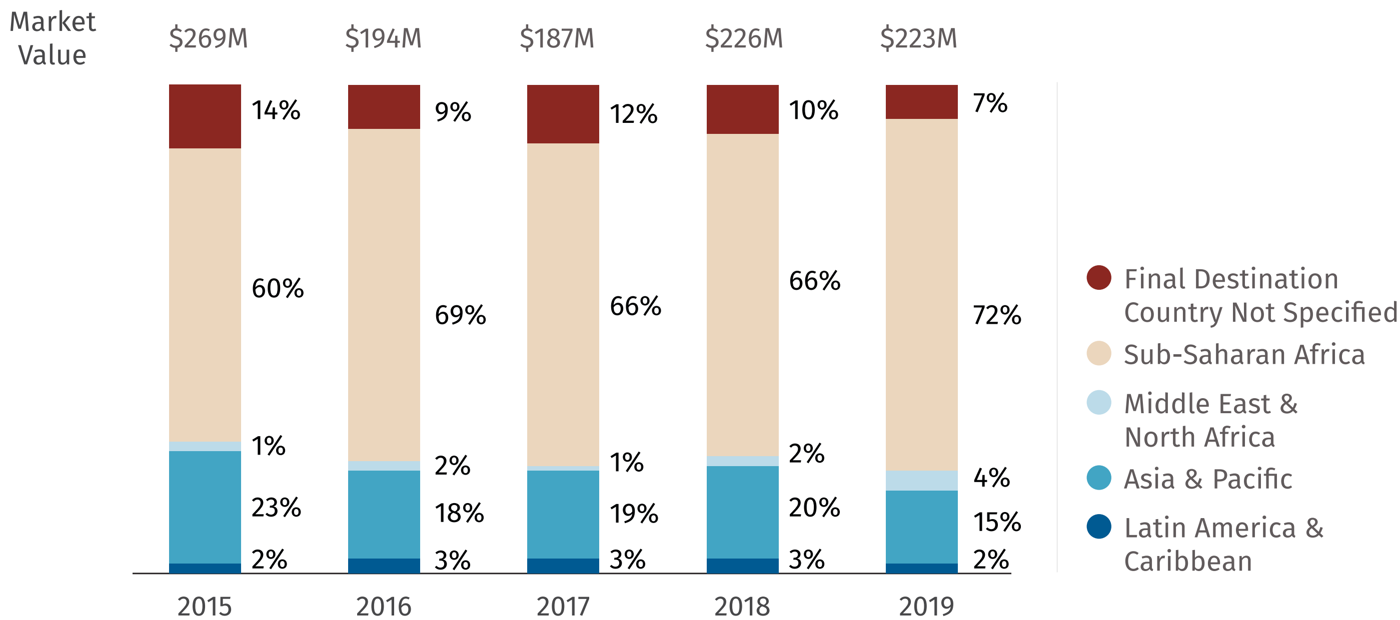
EXHIBIT 6: MARKET SHARE PER METHOD IN THE FP2020 PUBLIC-SECTOR MARKET (USD)



Note: The sum of percentages for each individual stacked bar may differ from 100% due to rounding.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020; [3] UNFPA Contraceptive Price Indicator, 2015–2019; [4] USAID, "Couple-Years of Protection (CYP)" [5] IAP Implant Price.

EXHIBIT 7: MARKET SHARE OF FP2020 PUBLIC SECTOR BY REGION (USD)



Note: The sum of percentages for each individual stacked bar may differ from 100% due to rounding.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020; [3] UNFPA Contraceptive Price Indicator, 2015–2019; [4] IAP Implant Price

EXHIBIT 8: TOP TEN COUNTRIES IN TERMS OF VALUE, 2019

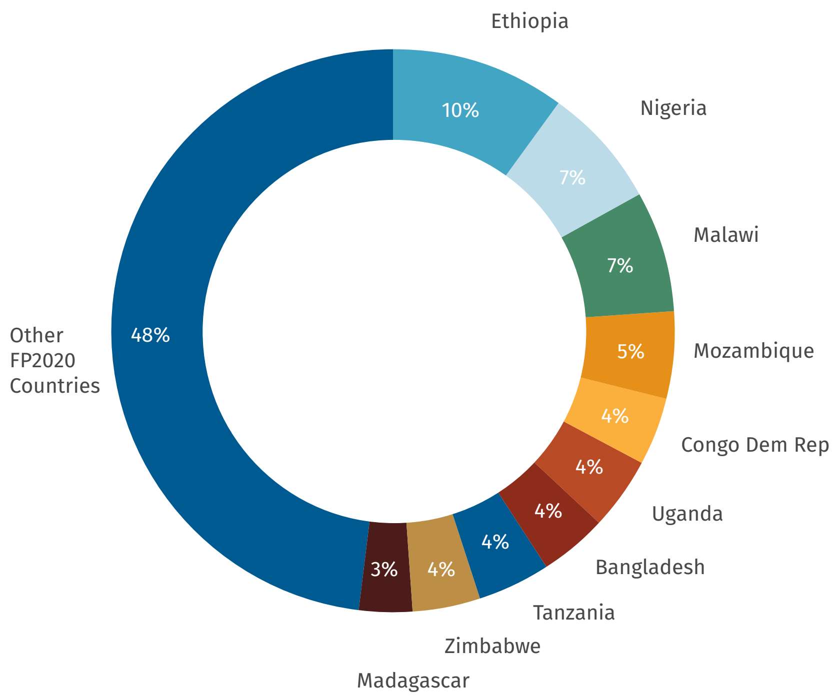
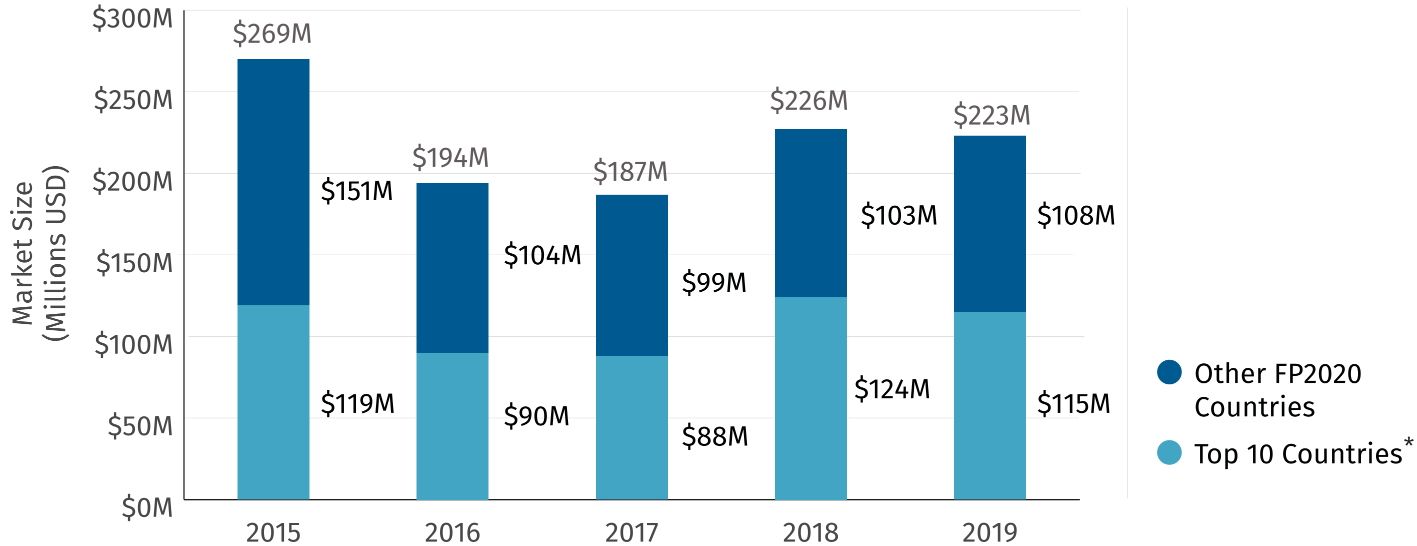


EXHIBIT 9: VALUE OF 10 LARGEST FP2020 PUBLIC-SECTOR COUNTRIES COMPARED TO VALUE OF ALL OTHER COUNTRIES COMBINED



* Top countries in this graph are defined by 2019 data and in alphabetical order are: Bangladesh, Congo Dem Rep, Ethiopia, Madagascar, Malawi, Mozambique, Nigeria, Tanzania, Uganda, Zimbabwe.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020; [3] UNFPA Contraceptive Price Indicator, 2015–2019; [4] IAP Implant Price

This section focuses on data from the Procurement Service Branch of UNFPA and USAID's "Overview of Contraceptive and Condom Shipments" report to understand the historical spend by the two major institutional procurers in the public-sector markets of the 69 FP2020 focus countries.

UNFPA'S SPEND ON CONTRACEPTIVES HIT ANOTHER HISTORIC HIGH IN 2019, CONTINUING A STEADY INCREASE IN SPENDING SINCE 2016. USAID'S SPEND DECLINED IN FY2019[9] VERSUS FY2018, APPROACHING ITS FY2017 LOW. USAID'S SPEND HAS YET TO REBOUND TO LEVELS SEEN IN FY2015. HOWEVER, BETWEEN UNFPA AND USAID, THE AGGREGATE DONOR SPEND REMAINED LARGELY CONSTANT FROM THE 2018 TO 2019 FISCAL YEARS.

For UNFPA, the value of contraceptives procured increased by 9 percent from 2018 to 2019. In 2019, a total of $162 million was spent on contraceptive products, the highest figure seen throughout the 2015-19 period (Exhibit 10). The 2019 growth in UNFPA's spend was driven by a mix of increased UNFPA program procurement and third-party procurement. Third-party procurement as a percent of total UNFPA spend grew from 10 percent to 17 percent between 2018 and 2019.[10]

The annual value of USAID's spend on contraceptives shipped, excluding male and female condoms,[11] in FY2019 was $38 million, down 24 percent from FY2018 (Exhibit 11). USAID's FY2018 spend had increased from a historic low of $34 million in 2017 to $50 million in 2018. Spend throughout FY2016-FY2019, however, represents a significant decrease compared to USAID's $73 million in annual spend in FY2015, the highest funding level recorded during the 5-year period. In the FY2019 report, USAID indicated that several factors may have contributed to this decrease in FY2019, including savings from strategic sourcing, global production constraints for products like injectables, and a decline in procurement after the relative increase in FY2018.[12] Furthermore, missions in certain countries may also be submitting fewer requests for contraceptive procurement funding as USAID continues to implement its "Journey to Self-Reliance" strategy.[13]

9. USAID Fiscal Year (FY) runs from Oct. 1 to Sept. 30.
10. UNFPA PSB Procurement Values, 2018-2019.
11. The FY2019 report is reflective of family planning funding and does not include HIV/AIDs funded condoms; thus, the report excludes female and male condom values for 2015 to 2019 to compare a consistent data set across years.
12. Overview of Contraceptive and Condom Shipments FY2019 report available here: https://www.ghsupplychain.org/news/contraceptives-and-condoms-2019-report-published#:~:text=USAID%20has%20published%20the%20Overview%20of%20Contraceptive%20and%20Condom%20Shipments%20FY2019%20report.&text=The%20overall%20total%20delivered%20value,year%202019%20was%20%2439.1%20million.
13. USAID's "Journey to Self-Reliance" strategy fosters cooperation with host country governments to strengthen local capacities, partner with the private sector, and work towards financing self-reliance. USAID information available here: https://www.usaid.gov/selfreliance

EXHIBIT 10: UNFPA PROCUREMENT VALUE – CONTRACEPTIVES TO FP2020 COUNTRIES (IN USD)

2018-2019 Year Over Year: +9%
2015-2019 Compound Annual Growth Rate: +11%

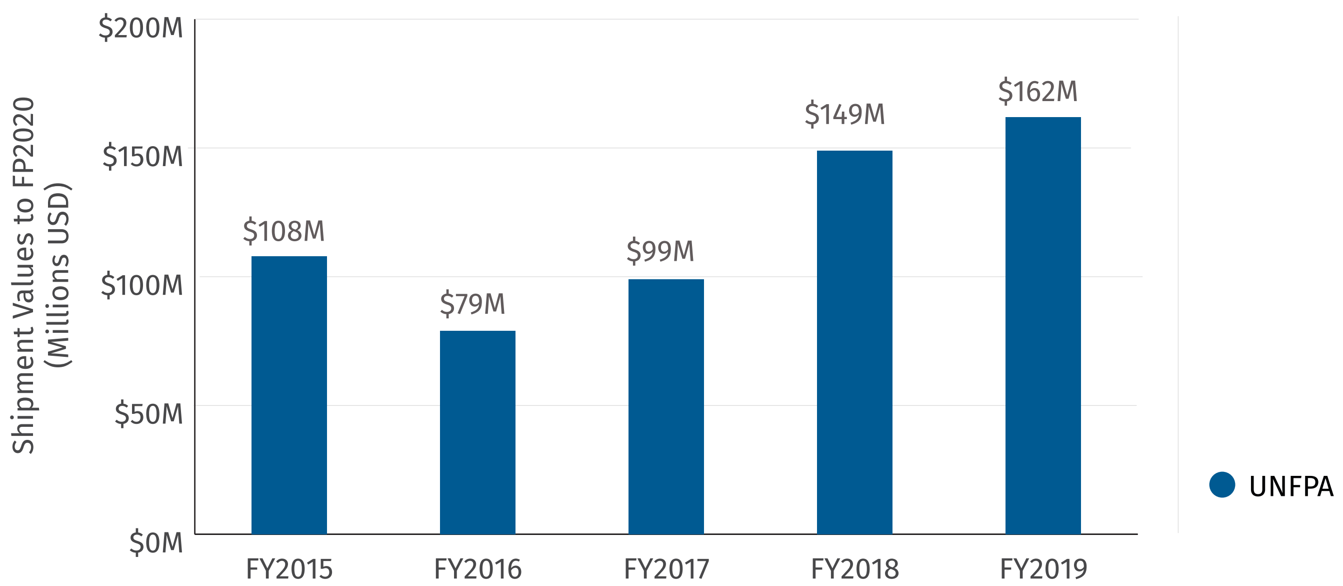
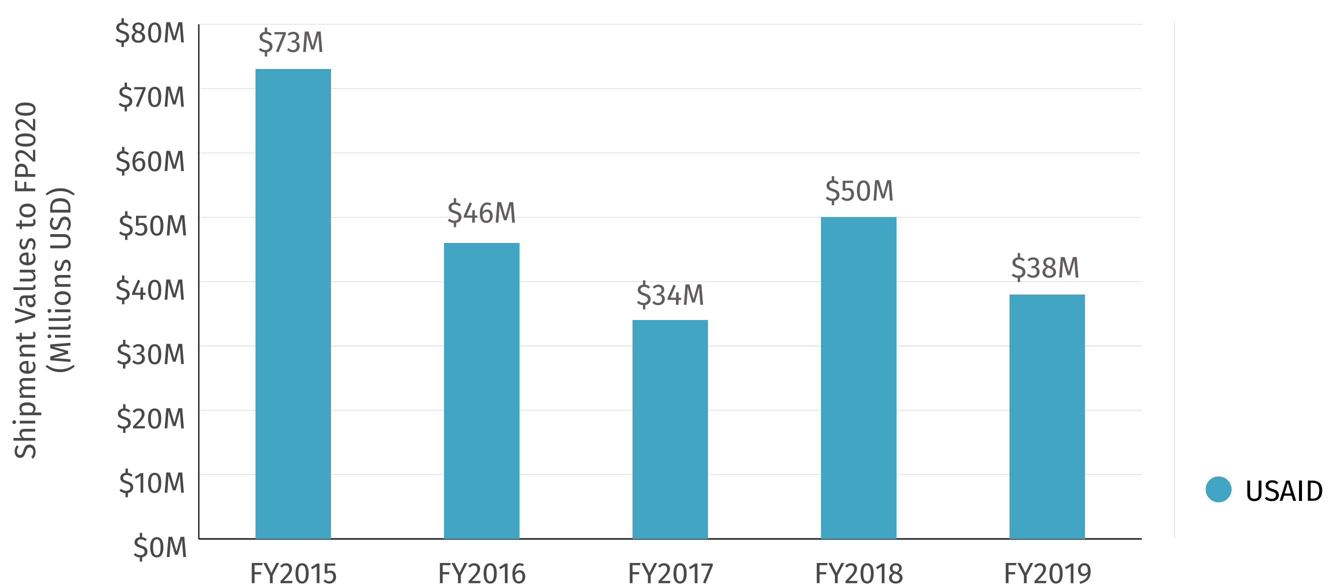


EXHIBIT 11: USAID WORLDWIDE CONTRACEPTIVE (EXCL. MALE AND FEMALE CONDOMS) SHIPMENT VALUES TO FP2020 COUNTRIES (IN USD)

2018-2019 Year Over Year: -24%
2015-2019 Compound Annual Growth Rate: -15%



Sources: [1] UNFPA PSB Procurement Values 2015 -2019; [2] USAID Worldwide Contraceptive and Condom Shipments FY2015 – 2019

DONOR SPEND ON CONTRACEPTIVES SHIPPED REMAINED ROUGHLY CONSTANT BETWEEN 2018 AND 2019. HOWEVER, OVERALL UNCERTAINTY AROUND THE LONG-TERM TRAJECTORY OF DONOR SPENDING ON CONTRACEPTIVE PROCUREMENT REMAINS A CONCERN.

Although UNFPA's 2019 spend on contraceptives reached its highest level over the 2015-2019 period, there remains a level of uncertainty regarding longer-term donor funding.

The UK government has committed £600 million in funding to the sexual and reproductive health space for the 2020-2025 period.[14] £425 million of this funding has been committed directly to UNFPA Supplies[15] to support the procurement of reproductive health commodities.

In the United States, USAID's spending on the procurement of contraceptives has decreased to levels approaching the 2017 historic low, and future commitments to contraceptive procurement remain uncertain.[16]

These trends are likely to continue beyond the near term. Based on key stakeholder discussions within the sexual and reproductive health community, the 2019 RHSC Global Contraceptive Commodity Gap Analysis suggests that reduced or stagnant donor funding will continue well into the next decade[17].

While the procurement data in this year's report indicates that the market value of the FP2020 countries' public sector remained stable in 2019, flat procurement for contraceptives should not be conflated with stagnant demand. Estimates from the 2019 RHSC Global Contraceptive Commodity Gap analysis suggest that the demand for contraceptives continues to grow and that a significant gap will accumulate between demand for, and the ability to provide contraceptives, especially in lower-income countries.[18] Many countries' supply plans remain partially unfunded due to a lack of donor or domestic financing, complicated by a lack of supplies in some instances to fulfill demand. Thus, to meet growing demand in FP2020 countries for safe, effective, and quality-assured contraceptive products, donor and/or domestic funding will need to increase, alongside continued initiatives to promote affordability for a broad method mix of quality-assured, family planning products.

14. https://www.gov.uk/government/news/healthcare-for-everyone-must-prioritise-womens-sexual-and-reproductive-health-and-rights-says-uk-at-un-general-assembly
15. https://www.unfpa.org/updates/united-kingdom-commits-425-million-family-planning-preventing-millions-unintended
16. At the time of report writing, the US Senate Appropriations Committee had proposed bilateral funding for family planning and reproductive health (FP/RH) of $461M in FY2021 with no funding allocated for UNFPA. This Senate proposal represents a 21% decrease compared to the level of FY2021 FP/RH funding proposed by the House. Final negotiations are still continuing https://www.kff.org/news-summary/senate-appropriations-committee-releases-draft-fy-2021-state-and-foreign-operations-sfops-and-labor-health-and-human-services-labor-hhs-appropriations-bills/
17. 2019 Commodity Gap Analysis, RHSC. Available at https://www.rhsupplies.org/activities-resources/commodity-gap-analysis/
18. The 2019 RHSC Commodity Gap Analysis estimates that the number of users of contraception in LMICs will reach 487M in 2020 and will grow by another 44 million users by 2025. If donor/ domestic funding levels remains the same, a funding gap of $178M will emerge in 2020, and a cumulative gap of $1.17B will accrue over 2021-2025.

CHAI CONSULTED A NUMBER OF SUPPLIERS, DONORS, AND OTHER SEXUAL AND REPRODUCTIVE HEALTH PARTNERS TO DISCUSS THE TRENDS OBSERVED IN THIS REPORT.

Although the public-sector market value in FP2020 countries held steady in 2019, stakeholders continued to express concern about the long-term outlook for donor funding. While estimates show the demand for safe, effective, and quality-assured contraception will continue to grow per the 2019 RHSC Commodity Gap Analysis,[19] projections also anticipate a widening funding gap.

Considering the production challenges related specifically to the injectables market, stakeholders expressed relief that injectable volumes shipped to FP2020 countries did not decrease even further beyond the 16% decline observed from 2018 to 2019. Stakeholders pointed to the positive impact of having multiple injectable supply sources in alleviating the impact of certain production constraints.

As in previous years, stakeholders noted that supply-side dynamics influence the procurement data shown in this report. This dynamic is noted in the 2016 RHSC Commodity Gap Analysis,[20] as general procurement trends "may also reflect a number of factors in addition to user consumption such as the volume necessary to fill supply pipelines and maintain adequate inventory levels from central warehouses to individual service delivery points. Procurement quantities may take into account the volume of supplies already present or on order, inventory holding policies along the supply chain, and wastage or "leakage" of supplies at various levels. Constraints on funding, price, incentives, plans to expand programs in the future, and preferences by donors or the government itself for particular methods or products may also influence what type and what volume of supplies to procure."

Finally, looking forward, stakeholders indicated that the obstacles and setbacks suppliers, procurers, providers, health systems, and users of contraception have faced and continue to face due to the COVID-19 pandemic are likely to impact data for the 2020 calendar year. These obstacles include supply-side challenges, such as manufacturing or API sourcing during the pandemic environment, as well as demand-side challenges.

19. Users of contraception in LMICs are expected to increase by 82.2M by 2030, per the 2019 RHSC Gap Analysis. .

20. 2016 RHSC Commodity Gap Analysis. Available at https://www.rhsupplies.org/uploads/tx_rhscpublications/Global_Contraceptive_Commodity_Gap_Analysis_2016.pdf

About the Global Markets Visibility Project

The Global Markets Visibility Project is a landmark initiative that has provided the reproductive health community with detailed assessments of the public-sector family planning market across the 69 FP2020 focus countries since 2015. The initiative provides insightful and strategic outputs for donors, MOHs, implementing organizations, and suppliers to develop and implement more effective strategies to enable women in the 69 FP2020 focus countries to use family planning products and services.

This report is a joint collaboration between CHAI and the Reproductive Health Supplies Coalition (RHSC). The initial 2015 report comprised data from 11 manufacturers. Each manufacturer entered into a formal MOU with CHAI or provided their information through collaborations with the Generic Manufacturers Caucus for Reproductive Health (GEMs) and i+solutions. Since then, coverage has expanded, and today there are 16 suppliers participating in the project. Donors, suppliers, and partners remain fully committed to this project, expressing strong interest in continuing to strengthen the family planning community's market knowledge.

Market Definition, Scope, and Coverage

The total FP2020 public-sector market referenced in this report only includes data for the public sector in the 69 FP2020 focus countries, which is defined as volumes purchased by institutional buyers (USAID, UNFPA, SMOs, etc.) and MOH or government-affiliated procurers.

Although significant efforts have been deployed to collect as much data as possible, it should be noted that this report may not represent the entirety of institutional purchases for the FP2020 public sector. This report includes data from many but not all suppliers associated with these markets.

About the Participating Suppliers

Bayer

Bayer is a Germany-based life science company with core competencies in health care and agriculture. Its contraceptive product portfolio includes contraceptive implants, hormonal IUS, combined and progestin-only oral contraceptives, and injectables.

CR Zizhu

China Resources Zizhu Pharmaceutical Co., Ltd. (CR Zizhu) is a manufacturer of reproductive health products based in China. Its contraceptive product portfolio includes emergency oral contraceptives and combined oral contraceptives. CR Zizhu also manufactures misoprostol and several APIs including levonorgestrel.

Cipla

Cipla Limited is an India-based generic manufacturer with over 1,500 products in the areas of respiratory diseases, HIV/AIDS, malaria, MDRTB[21], and reproductive health. Its contraceptive product portfolio includes emergency contraceptives and combined oral contraceptives. It also manufactures misoprostol.

Cupid

Cupid Limited is a manufacturer and supplier of quality male condoms, female condoms, and water-based lubricant jelly, based in Nashik, India since 1998. Cupid has been prequalified by WHO/UNFPA for the supply of both male condoms and female condoms for worldwide public distribution. It supplies its products to more than 80 countries worldwide and helps in the prevention of HIV/STIs and unintended pregnancy. Apart from supplying its own brand of products like Cupid Angel & Fantasy, Cupid Limited also provides third-party manufacturing services to major companies like DKT and MSI.

Female Health Company

Female Health Company is the global public-sector division of Veru Healthcare focusing on urology and oncology, headquartered in Miami, Florida, USA.

The Female Health Company is the manufacturer of the FC2 female condom and focuses on the global public health sector business. FC2 is approved by the US FDA and WHO pre-qualified for offering dual protection against sexually transmitted infections and unintended pregnancy.

Helm AG

Helm AG is a Germany-based, family owned multifunctional distribution company specializing in: chemicals (feedstocks and derivatives), crop protection, active pharmaceutical ingredients and pharmaceuticals, and fertilizers. Until 2017, its main contraceptive product was a 3-month injectable (DMPA).

HELM AG was a participating supplier in the FP2020 Global Markets Visibility Project for the FP 2015, 2016, and 2017 Market Reports. In September 2017, HELM AG sold its wholly-owned subsidiary company, HELM Medical GmbH, to Sanavita Pharmaceuticals GmbH, a firm based in Germany whose parent company is Braun Beteiligungs GmbH. Following the transaction, HELM AG discontinued its IUD and Injectables business units and consequently the FP 2018, FP 2019, and FP 2020 reports do not contain shipment volumes for IUDs or Injectables from HELM AG. Sanavita Pharmaceuticals will assume responsibility for HELM's male condoms business unit. No supplier shipment data for male condoms from HELM or Sanavita is shown or used for analyses in this report. All shipment data for male condoms in this report is derived from the RHI database.

21. MDRTB stands for multi-drug resistant tuberculosis.

Incepta Pharmaceuticals

Incepta Pharmaceuticals Ltd. is a pharmaceutical company based in Dhaka, Bangladesh, that manufactures and markets generic drugs. Incepta has a portfolio of more than 500 generic products, in 1,100+ presentations, across various therapeutic areas. Incepta currently exports its products to 71 countries around the world. Its contraceptive product portfolio includes oral (combined and progestin only) and injectable contraceptives.

Medicines360

Medicines360 is a US-based, nonprofit global women's health pharmaceutical company that seeks to expand access to quality medicines for all women. Medicines360 developed a hormonal IUS that is approved in more than 20 countries worldwide. It is sold under the trade name Liletta® in the U.S. and Avibela® in low- and middle-income countries. Liletta® is a registered trademark of Odyssea Pharma SPRL, an Allergan affiliate. Avibela® is a registered trademark of Medicines360 in its countries of sale.

Merck (MSD)

Merck & Co., Inc. is a US-based healthcare company which operates as Merck Sharp & Dohme (MSD) outside of the USA and Canada. Its contraceptive product portfolio includes the contraceptive implant (IMPLANON NXT, which includes a prefilled sterile applicator), oral contraceptives (EXLUTON & MARVELON) for FP2020 public-sector markets and oral contraceptives (CERAZETTE, EXLUTON, MARVELON & MERCILON) and the contraceptive implant (IMPLANON NXT) and contraceptive vaginal ring (NUVARING) for non-FP2020 markets.

Mylan

Mylan is a US-based healthcare company with over 7,500 marketed products. Its contraceptive product portfolio includes oral (combined, progestin only, and emergency) and injectable contraceptives, and IUDs.

Pfizer

Pfizer is a US-based healthcare company. Its contraceptive product portfolio includes a 3-month injectable DMPA IM (Depo-Provera) and 3-month injectable DMPA SC (Sayana Press).

Pregna

Pregna is a manufacturer of contraceptive products based in India. Its contraceptive product portfolio includes hormonal IUS (Eloira), IUDs, and tubal rings used for female sterilization.

PT Tunggal

PT Tunggal Idaman Abdi (PT Tunggal) is a pharmaceutical manufacturer based in Indonesia focusing on reproductive healthcare. Its contraceptive product portfolio includes a monthly injectable, a 3-month injectable, a combined oral contraceptive, and an emergency oral contraceptive.

Shanghai Dahua

Shanghai Dahua Pharmaceutical Co., Ltd (Dahua) is a manufacturer of contraceptive implants based in China. On June 30th, 2017, the World Health Organization (WHO) pre-qualified Dahua's Levoplant (formerly known as Sino Implant II) for three years of use.

SMB

SMB is a manufacturer of medical devices, including IUDs and surgical sutures, based in India. Its key contraceptive products are IUDs, including Copper T 380A, TCu 380Ag, TCu 380 Plus, and SMB Cu 375.

Techno Drugs

Techno Drugs Ltd. is a manufacturer of both human and veterinary medicines based in Bangladesh. Its contraceptive product portfolio includes combined oral contraceptives, implants, and injectables. For injectables, Techno Drugs has also served as a supplier to Helm AG previously.

APPENDIX A

69 FP2020 COUNTRIES MARKET VOLUMES BY METHOD[22] AND COUNTRY, 2015–2019

EXHIBIT A.1: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2015

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	4,728,000	4,500	0	30,000	300,000
Bangladesh	0	50,000	15,100,000	0	24,000,000
Benin	12,169,800	222,536	125,500	66,500	463,602
Bhutan	1,936,800	0	111,000	0	129,999
Bolivia	0	3,500	0	0	0
Burkina Faso	19,747,510	244,044	564,000	35,500	3,555,723
Burundi	5,760,000	134,500	1,639,267	0	520,528
Cambodia	5,730,480	11,000	200,000	30,000	9,484,891
Cameroon	26,245,443	125,052	10,000	46,550	29,079
Central African Republic	0	500	37,900	0	22,881
Chad	100,000	7,600	0	0	0
Comoros	1,303,200	1,008	78,400	0	35,001
Congo Dem Rep	65,606,368	308,230	1,189,200	32,222	3,758,922
Congo Rep	7,104,840	11,000	622,360	0	0
Cote d'Ivoire	100,000	15,664	212,000	0	5,224,561
Djibouti	0	500	296,667	0	79,995
Egypt Arab Rep	0	0	0	258,200	0
Eritrea	0	0	120,000	0	108,000
Ethiopia	31,052,091	1,180,607	2,000,000	650,000	8,478,983
Gambia	2,900	30,048	265,000	0	141,840
Ghana	13,995,000	403,236	1,394,600	0	1,993,464
Guinea	10,080,000	32,500	907,448	0	431,280
Guinea-Bissau	3,384,720	59,400	27,500	0	59,040
Haiti	60,014,400	9,300	421,400	0	201,759
Honduras	10,000,800	93,656	1,725,800	62,000	2,446,065
India	0	0	795,252	1,273,927	325,000
Indonesia	20,000	25,086	0	171,000	0
Iraq	0	0	0	0	0
Kenya	45,779,200	905,900	2,231,000	70,000	3,125,201
Korea Dem Rep	0	0	0	0	0
Kyrgyz Republic	1,527,264	0	80,000	0	0
Lao PDR	10,875,960	20,000	333,000	0	1,530,720
Lesotho	21,016,000	1,500	81,800	0	120,009
Liberia	9,009,780	44,600	846,800	0	396,018
Madagascar	1,500,000	72,722	9,349,250	35,996	595,605

22. Female condoms are aggregated with male condoms by country in order to protect data confidentiality.

APPENDIX A

EXHIBIT A.1: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2015

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Malawi	68,274,192	278,786	6,099,200	0	552,795
Mali	39,764,195	195,805	432,840	18,393	908,569
Mauritania	0	86,264	41,200	0	84,384
Mongolia	1,360,800	0	90,000	0	242,382
Mozambique	41,712,000	95,000	3,025,500	0	0
Myanmar	42,251,912	108,156	7,231,700	900	1,134,860
Nepal	8,304,000	127,500	1,067,000	0	2,304,779
Nicaragua	0	2,000	65,050	3,000	188,640
Niger	0	12,700	820,800	10,425	2,226,162
Nigeria	97,478,368	379,591	8,132,250	75,000	2,474,121
Pakistan	290,853,000	210,484	0	3,024,116	0
Papua New Guinea	3,480	100,800	1,327,200	0	12,999
Philippines	0	731,244	0	82,336	4,135,001
Rwanda	18,626,900	28,752	727,667	5,768	265,296
Sao Tome and Principe	0	0	9,400	0	65,997
Senegal	18,858,530	65,384	760,000	0	1,393,920
Sierra Leone	7,926,120	68,500	726,800	0	1,058,340
Solomon Islands	0	0	15,000	0	0
Somalia	151,200	52,016	197,900	0	207,360
South Sudan	9,036,000	53,100	89,350	0	139,702
Sri Lanka	0	56,000	574,000	130,000	1,589,760
Sudan	3,000	30,568	474,200	0	3,851,868
Tajikistan	24,812,640	3,500	90,000	0	270,000
Tanzania	846,800	1,241,695	9,935,400	194,124	143,397
Timor-Leste	0	12,000	240,000	2,000	79,902
Togo	4,810,000	59,672	495,400	0	261,468
Uganda	35,316,096	258,060	8,235,050	48,300	218,859
Uzbekistan	0	0	701,600	2,408,900	1,989,949
Vietnam	0	0	0	1,005,000	0
West Bank and Gaza	0	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	5,256,000	25,536	14,300	75,000	7,706,239
Zambia	66,167,400	245,900	3,399,400	13,000	3,707,865
Zimbabwe	141,429,280	98,500	889,100	1,900	9,400,083
Other FP2020 Shipment Volumes	85,564,584	1,564,900	352,600	113,550	60,732,503
Total Volumes	**1,377,597,053**	**10,210,602**	**97,025,050**	**9,973,607**	**174,905,366**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020.

APPENDIX A

EXHIBIT A.2: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2016

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	1,010,880	14,200	19,000	20,000	211,440
Bangladesh	0	150,000	8,200,000	0	0
Benin	3,708,000	277,028	70,000	27,000	5,040
Bhutan	0	0	237,000	0	0
Bolivia	50,400	67,800	3,000	0	5,760
Burkina Faso	12,911,000	427,800	1,123,500	0	1,600,971
Burundi	14,555,999	1,600	0	0	70,240
Cambodia	5,719,248	58,960	1,000,000	30,000	10,539,359
Cameroon	18,205,048	82,488	482,975	0	500,000
Central African Republic	3,628,800	6,200	147,600	500	262,296
Chad	0	41,024	15,600	0	0
Comoros	1,442,448	1,972	113,000	0	77,040
Democratic Republic of Congo	17,404,997	688,089	0	10,000	1,026,756
Congo Rep	3,600,000	1,008	6,720	29,650	2,880
Cote d'Ivoire	24,570,000	97,256	3,023,395	10,000	997,500
Djibouti	0	0	663,000	0	44,280
Egypt Arab Rep	0	140,000	0	2,680,434	0
Eritrea	0	0	100,000	0	126,640
Ethiopia	63,828,000	1,022,105	7,570,056	751,144	6,625,921
Gambia	2,880,000	20,016	313,000	0	565,200
Ghana	32,898,960	141,432	3,889,100	15,410	2,751,660
Guinea	17,486,000	77,000	90,000	0	512,644
Guinea-Bissau	0	50,000	13,000	0	10,080
Haiti	79,854,000	5,300	0	1,500	30,240
Honduras	27,183,600	0	1,977,000	0	1,385,280
India	5,000	0	23,984	865,062	6,137,520
Indonesia	5,000	350,000	0	120,074	0
Iraq	0	1,000	0	0	0
Kenya	54,090,024	742,864	95,000	37,500	3,403,080
Korea Dem Rep	0	0	905,200	0	0
Kyrgyz Republic	2,440,080	0	0	0	0
Lao PDR	0	53,200	850,600	0	1,405,440
Lesotho	13,263,000	23,452	260,400	0	218,160
Liberia	12,461,280	44,600	0	0	251,040
Madagascar	4,500,000	303,932	1,440,600	0	849,600
Malawi	27,520,000	33,700	2,475,200	0	0
Mali	23,680,704	27,072	25,000	17,300	20,160

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EXHIBIT A.2: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2016

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	3,110,400	2,500	39,000	0	164,160
Mongolia	1,540,800	3,100	30,000	0	405,108
Mozambique	59,034,000	0	90,000	13,000	205,920
Myanmar	16,169,472	147,348	1,800	0	7,560,366
Nepal	32,654,280	98,400	25,400	31,950	228,066
Nicaragua	3,000,000	4,008	0	15,000	0
Niger	0	50,400	1,317,700	0	3,141,960
Nigeria	149,734,200	771,763	1,278,600	90,030	3,320,703
Pakistan	108,752,496	800	0	1,872,716	15,120
Papua New Guinea	1,994,400	103,000	22,600	0	11,520
Philippines	0	0	0	1,070,737	0
Rwanda	19,458,000	65,294	1,734,900	0	2,439,900
Sao Tome and Principe	0	0	0	0	63,360
Senegal	5,094,000	179,864	10,000	32,675	860,949
Sierra Leone	1,080,000	73,000	280,200	5,500	955,860
Solomon Islands	0	0	0	0	0
Somalia	0	0	1,950	0	19,000
South Sudan	9,681,120	30,000	150,000	0	172,080
Sri Lanka	0	50,500	650,000	100,000	6,049,600
Sudan	7,216,992	49,104	29,800	3,500	338,345
Tajikistan	17,392,200	0	93,000	25,000	415,440
Tanzania	428,800	986,112	4,741,200	486,000	5,621,360
Timor-Leste	0	10,500	0	0	0
Togo	15,056,128	46,656	315,800	0	27,360
Uganda	19,200,000	234,524	1,184,250	45,200	5,740,520
Uzbekistan	6,228,720	0	848,400	432,800	0
Vietnam	0	0	0	1,096,080	0
West Bank and Gaza	0	0	800	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	6,302,880	0	157,000	75,000	1,141,120
Zambia	32,762,600	142,000	443,000	0	0
Zimbabwe	164,863,000	140,656	661,800	1,800	19,521,550
Other FP2020 Shipment Volumes	20,389,000	1,016,700	392,800	198,850	21,702,220
Total Volumes	**1,170,045,956**	**9,157,327**	**49,632,930**	**10,211,412**	**119,757,814**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020.

APPENDIX A

EXHIBIT A.3: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2017

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	16,665,408	9,800	59,600	0	365,200
Bangladesh	1,195,200	400,000	7,258,000	0	0
Benin	28,646,399	34,900	30,600	0	0
Bhutan	0	0	0	0	0
Bolivia	2,001,600	94,600	50,400	0	30,000
Burkina Faso	15,050,016	95,300	481,200	0	3,741,150
Burundi	22,039,200	0	17,500	0	169,980
Cambodia	1,929,600	40,056	900,000	60,000	7,082,236
Cameroon	6,658,400	95,200	327,000	0	298,080
Central African Republic	268,999	0	0	0	95,040
Chad	0	0	0	0	0
Comoros	1,267,200	2,520	40,000	0	60,480
Congo Dem Rep	35,914,800	364,828	2,143,580	0	1,380,220
Congo Rep	2,160,000	76,076	32,000	0	720
Cote d'Ivoire	27,994,968	196,600	243,000	0	6,521,413
Djibouti	0	0	0	0	6,480
Egypt Arab Rep	0	40,032	0	375,045	0
Eritrea	8,640,000	12,500	100,000	0	112,560
Ethiopia	77,886,000	1,107,134	7,436,988	440,000	10,794,948
Gambia	5,371,200	16,488	110,000	1,500	235,440
Ghana	0	250,256	106,000	11,500	3,183,960
Guinea	9,518,136	100,000	0	0	30,240
Guinea-Bissau	8,412,624	27,300	2,500	0	2,160
Haiti	84,455,880	4,116	863,400	0	647,304
Honduras	34,884,000	1,440	21,000	0	1,641,840
India	0	0	1,047,488	522,885	2,262,311
Indonesia	0	0	0	0	0
Iraq	316,944	0	0	0	40,032
Kenya	445,000	408,781	437,376	126,000	7,921,836
Korea Dem Rep	0	0	0	0	0
Kyrgyz Republic	7,264,800	0	0	0	0
Lao PDR	3,474,840	65,808	76,800	0	701,040
Lesotho	14,001,000	31,200	165,000	0	176,400
Liberia	8,013,000	36,100	319,000	0	5,760
Madagascar	0	256,618	3,012,800	295,019	1,288,800
Malawi	27,759,000	167,408	1,000,000	36,500	236,700
Mali	20,115,816	209,728	293,000	0	210,240

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EXHIBIT A.3: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2017

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	0	10,404	88,600	0	295,920
Mongolia	1,144,800	800	0	37,000	350,160
Mozambique	110,763,420	60,016	1,373,600	23,600	3,278,160
Myanmar	35,536,744	18,936	6,108,125	200	14,780,928
Nepal	24,981,000	211,800	641,000	74,000	4,015,160
Nicaragua	2,911,680	504	0	0	50,000
Niger	979,200	54,100	499,000	7,920	437,040
Nigeria	44,137,048	665,160	3,316,700	0	1,229,445
Pakistan	20,000	900	0	50,090	123,840
Papua New Guinea	1,101,600	30,000	22,000	4,000	82,720
Philippines	0	0	0	0	0
Rwanda	20,606,200	84,062	8,200	13,200	68,400
Sao Tome and Principe	1,108,800	300	28,000	0	98,100
Senegal	7,005,000	67,864	160,000	0	139,140
Sierra Leone	19,728,000	230,400	332,650	16,000	1,087,240
Solomon Islands	0	0	0	0	0
Somalia	0	2,500	3,500	0	0
South Sudan	11,340,000	25,016	150,000	0	20,000
Sri Lanka	4,056,624	65,500	0	0	3,589,760
Sudan	0	36,936	0	6,000	2,123,400
Tajikistan	5,689,200	0	142,000	0	613,440
Tanzania	4,320,184	798,920	2,830,850	177,000	2,885,763
Timor-Leste	1,080,000	20,000	0	0	0
Togo	14,946,200	67,388	140,000	0	25,002
Uganda	78,884,400	297,652	3,895,400	251,000	249,520
Uzbekistan	13,217,540	0	0	0	718,989
Vietnam	21,816,000	12,636	1,196,500	1,239,531	0
West Bank and Gaza	1,944,000	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	7,104,960	64,288	445,000	0	0
Zambia	87,918,794	161,800	3,418,650	0	3,528,960
Zimbabwe	104,901,000	60,496	1,399,200	10,000	12,716,941
Other FP2020 Shipment Volumes	9,942,000	1,058,100	5,912,600	228,950	23,003,805
Total Volumes	**1,109,534,426**	**8,251,267**	**58,685,807**	**4,006,940**	**124,754,403**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020.

APPENDIX A

EXHIBIT A.4: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2018

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	0	16,500	307,750	0	224,480
Bangladesh	10,771,200	793,064	15,194,000	480,000	20,049,680
Benin	12,966,000	38,100	38,000	0	2,250
Bhutan	0	0	0	0	0
Bolivia	0	73,300	200,000	0	230,022
Burkina Faso	12,008,400	342,940	246,400	0	3,398,400
Burundi	0	4,000	126,400	0	415,332
Cambodia	3,427,200	46,392	700,000	0	11,986,296
Cameroon	9,633,600	112,952	338,000	3,500	100,000
Central African Republic	12,960,000	4,800	108,200	0	39,648
Chad	1,008,000	38,846	187,000	0	5,000
Comoros	1,180,800	0	0	0	3,000
Democratic Republic of Congo	54,908,976	331,170	1,343,100	0	370,560
Congo Rep	0	246,500	0	86,000	12,120
Cote d'Ivoire	25,420,800	139,088	474,800	18,800	3,867,676
Djibouti	396,000	3,200	70,400	0	0
Egypt Arab Rep	0	160,046	0	3,774,650	0
Eritrea	0	2,200	100,000	0	10,025
Ethiopia	25,152,720	1,205,446	7,753,455	600,000	7,896,030
Gambia	0	1,400	160,500	0	660,816
Ghana	33,221,400	282,314	2,423,500	30,500	2,827,200
Guinea	0	0	100,000	0	51,360
Guinea-Bissau	10,310,400	0	6,600	0	42,120
Haiti	101,747,640	34,016	1,827,000	2,000	100,212
Honduras	34,740,000	1,000	107,000	1,100	74,880
India	0	0	102,000	3,221,980	366,065
Indonesia	0	0	0	852,430	0
Iraq	1,000,800	0	0	0	0
Kenya	2,000,000	379,232	470,124	84,225	12,791,937
Korea Dem Rep	0	0	0	0	0
Kyrgyz Republic	0	0	0	0	0
Lao PDR	600,000	0	242,000	0	660,600
Lesotho	8,192,600	7,644	15,000	0	116,682
Liberia	28,800	37,500	705,200	0	32,400
Madagascar	5,001,000	325,344	4,866,200	0	204,800
Malawi	180,945,600	173,874	4,947,825	0	1,250,484
Mali	10,207,200	56,576	1,578,800	0	1,063,635

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EXHIBIT A.4: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2018

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	0	5,700	86,800	0	711,360
Mongolia	900,000	6,200	0	0	420,000
Mozambique	92,244,400	231,648	3,291,800	10,000	643,680
Myanmar	49,103,616	103,540	2,889,125	5,000	11,190,719
Nepal	16,943,496	176,000	2,170,400	20,000	3,299,530
Nicaragua	11,164,320	2,854	0	12,000	0
Niger	849,600	170,940	914,200	0	658,002
Nigeria	48,724,800	1,023,764	4,731,600	150,800	1,996,764
Pakistan	612,000	10,000	100,000	320,285	0
Papua New Guinea	5,680,800	60,000	5,000	0	424,967
Philippines	2,397,600	0	0	50,450	0
Rwanda	30,399,200	256,072	862,200	0	55,680
Sao Tome and Principe	1,315,008	500	26,000	0	67,080
Senegal	11,052,000	186,336	0	7,000	0
Sierra Leone	1,987,200	153,533	972,800	0	435,480
Solomon Islands	0	0	0	0	0
Somalia	100,800	15,240	100,000	0	0
South Sudan	2,476,000	54,000	340,000	0	610,080
Sri Lanka	0	500	0	0	2,119,680
Sudan	720,000	51,264	0	0	0
Tajikistan	5,083,200	0	138,000	0	595,224
Tanzania	2,868,000	810,780	2,067,300	10,000	1,273,980
Timor-Leste	0	3,900	0	0	0
Togo	14,767,832	75,264	118,400	0	164,154
Uganda	178,114,000	811,576	5,469,525	103,500	4,369,950
Uzbekistan	0	0	0	0	0
Vietnam	21,816,000	0	0	925,250	0
West Bank and Gaza	0	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	1,483,200	37,440	1,093,600	29,700	30,000
Zambia	85,347,400	115,096	1,855,950	0	6,965,040
Zimbabwe	150,850,460	87,500	1,010,975	0	18,265,635
Other FP2020 Shipment Volumes	22,487,648	1,263,200	7,977,325	87,000	10,256,278
Total Volumes	**1,317,317,716**	**10,570,291**	**80,960,254**	**10,886,170**	**133,406,993**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020.

APPENDIX A

EXHIBIT A.5: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2019

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	9,003,000	7,800	617,000	175,800	1,228,896
Bangladesh	3,204,000	265,253	4,383,060	300,000	16,506,300
Benin	103,000	214,400	125,600	10,000	0
Bhutan	1,584,000	0	0	0	0
Bolivia	10,000	78,500	60,000	0	12,240
Burkina Faso	7,013,000	416,984	1,161,500	0	4,800
Burundi	0	130,000	1,080,000	0	343,160
Cambodia	6,724,800	55,780	750,000	50,000	9,370,784
Cameroon	24,774,472	29,780	40,000	15,100	80,640
Central African Republic	0	738	94,900	0	1,615,008
Chad	6,819,120	153,366	379,800	0	226,080
Comoros	1,180,800	0	0	0	0
Democratic Republic of Congo	68,843,680	576,760	3,128,810	0	1,356,466
Congo Rep	0	148,904	19,800	190,405	9,540
Cote d'Ivoire	25,732,600	180,376	492,000	22,000	2,906,090
Djibouti	288,000	0	0	0	218,160
Egypt Arab Rep	11,224,800	333,164	0	490,200	0
Eritrea	0	17,300	100,000	0	10,800
Ethiopia	11,628,720	1,558,934	8,006,045	55,863	7,272,957
Gambia	2,548,800	69,984	140,000	0	105,840
Ghana	11,930,400	390,383	1,515,900	31,653	3,460,660
Guinea	49,433,040	0	666,600	0	287,440
Guinea-Bissau	10,581,904	0	22,500	0	221,436
Haiti	74,402,640	10,000	2,691,800	0	670,896
Honduras	0	144	45,000	0	600,000
India	0	0	0	814,796	38,100
Indonesia	5,000	0	0	1,093,300	0
Iraq	0	0	0	0	308,880
Kenya	38,478,000	366,320	80,000	24,930	3,085,600
Korea Dem Rep	288,000	0	0	0	74,880
Kyrgyz Republic	198,000	0	0	0	0
Lao PDR	1,490,400	0	256,000	0	2,857,608
Lesotho	1,728,000	2,016	140,600	0	117,900
Liberia	13,836,000	9,800	75,000	12,500	0
Madagascar	0	278,616	5,106,200	20,000	1,599,120
Malawi	180,626,600	670,252	6,569,700	0	2,534,400
Mali	25,216,560	293,636	256,200	2,000	682,560

APPENDIX A

EXHIBIT A.5: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2019

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	3,122,000	18,580	46,200	0	813,960
Mongolia	180,000	13,800	103,260	0	600
Mozambique	139,627,576	193,108	4,086,200	10,000	4,518,240
Myanmar	26,785,008	80,100	1,075,000	0	12,987,721
Nepal	13,999,872	224,200	349,800	0	1,750,896
Nicaragua	0	5,484	0	0	0
Niger	15,577,200	116,248	100,000	0	1,416,762
Nigeria	73,063,000	1,217,772	3,150,800	295,000	1,200,240
Pakistan	7,061,600	242,600	204,400	1,070,100	40,320
Papua New Guinea	2,997,800	145,000	572,400	0	364,209
Philippines	2,390,400	200,000	0	0	29,808
Rwanda	28,596,400	213,185	441,000	0	956,160
Sao Tome and Principe	1,058,200	800	19,000	0	100,080
Senegal	10,727,000	142,056	466,000	72,000	986,580
Sierra Leone	3,602,200	274,900	276,000	57,500	454,320
Solomon Islands	0	0	0	0	0
Somalia	0	0	45,000	0	810,000
South Sudan	10,850,000	0	350,000	0	1,004,400
Sri Lanka	4,913	100,508	0	0	2,119,680
Sudan	0	26,800	146,400	0	6,472,122
Tajikistan	4,489,200	0	166,000	0	717,768
Tanzania	30,880,400	421,154	3,895,300	174,590	3,911,247
Timor-Leste	725,760	10,000	220,000	0	340,704
Togo	26,079,160	79,600	274,400	0	569,952
Uganda	156,917,600	414,360	2,899,740	161,500	436,968
Uzbekistan	6,652,800	0	570,000	1,730,000	760,002
Vietnam	0	11,000	490,900	476,950	0
West Bank and Gaza	1,761,120	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	1,269,600	97,708	498,600	28,100	12,694,226
Zambia	87,024,384	81,456	2,884,600	0	2,113,590
Zimbabwe	122,185,440	186,600	758,000	0	6,225,040
Other FP2020 Shipment Volumes	16,560,800	456,500	6,216,400	219,730	14,807,358
Total Volumes	**1,383,086,769**	**11,232,709**	**68,309,415**	**7,604,017**	**136,410,194**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2020.

APPENDIX B — DATA SOURCES

In developing this report's market analyses, a variety of data sources from partner organizations that provide family planning market data at the global level were reviewed. These databases were assessed based on available metrics, coverage of countries, frequency of updates, and ease of access to identify the most appropriate sources for sustainable analyses, that will be updated as new data becomes available. The following provides an overview of the data sources this report relied upon for market analyses:

FP2020 Global Markets Visibility Project

In early 2014, CHAI, in partnership with RHSC and the FP2020 Market Dynamics Working Group, launched the Global Markets Visibility Project to help various donors, suppliers, and partners improve their understanding of the current market size and trends for key contraceptive markets. CHAI collects historical shipment data by product and country from suppliers for each of the 69 FP2020 focus countries. For the reports published in 2015, 2016, 2017, and 2018, CHAI partnered with Concept Foundation to collect and aggregate shipment data from participating members of the RHSC Generic Manufacturers for Reproductive Health Caucus (GEMs). For the subsequent reports, CHAI has collected shipment data directly from GEMs suppliers. To date, the Global Markets Visibility Project has collected historical shipment data that covers institutional sales (USAID, UNFPA, SMOs, etc.) and MOH tender volumes from 16 manufacturers across five family planning product categories. The main analyses and data reflected in this report in the Supplier Shipment Analysis and associated Appendices are based on the supplier shipment data collected through this project.

U.S. Agency for International Development (USAID) Overview of Contraceptive and Condom Shipments Report

USAID has provided commodities for family planning and reproductive health activities since the mid-1960s. The Overview of Contraceptive and Condom Shipments report is an annual publication that summarizes contraceptive and condom shipments sponsored by USAID, by value and unit. For the purposes of this year's Family Planning Market Report's Donor Spend Analysis, the FY2015 through FY2019 reports for FP2020 countries were accessed and used to analyze USAID's spend on contraceptives, excluding male and female condoms, over the period. Values are inclusive of commodity and freight costs and are reported based on the USAID fiscal year which ends on September 30.

The United Nations Population Fund (UNFPA) Procurement Services Branch (PSB) Procurement Data

UNFPA is the lead agency within the United Nations system for the procurement of reproductive health commodities and has been procuring reproductive health supplies for low- and middle-income countries for over 40 years. For the purposes of this year's Family Planning Market Report's Donor Spend Analysis, CHAI worked with UNFPA PSB to determine the value of the contraceptive procurement conducted by UNFPA from 2015 to 2019 for FP2020 countries. Values are inclusive of commodity cost and exclude services such as freight, sampling, inspection, and testing and are reported based on the calendar year.

Reproductive Health Interchange (RHI)[23]

Hosted by UNFPA, RHI has historically collected data on past and upcoming contraceptive volume shipments for over 140 countries from the central procurement offices of major contraceptive donors and procurers. This database has been updated at variable times that depend on the frequency of data submissions from the data provider. The database has aimed to capture all of UNFPA's and USAID's contraceptive purchases, MSI's and IPPF's central procurements, government procurement and a few other procuring organizations' purchases. For this report, the full RHI dataset was downloaded in September 2020. RHI is used as a comparison for the supplier dataset for a high-level understanding of supplier shipment data coverage as well as for male condom data.

23. RHI was formerly available at https://www.unfpaprocurement.org/rhi-home. On September 21, 2020, the RHI interface was replaced by RH Viz. RHI Viz is a series of public-facing dashboards, combining historical procurement data with live shipment data from the Global Family Planning VAN. (https://www.rhsupplies.org/activities-resources/tools/reproductive-health-supplies-visualizer-rh-viz/).

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

The value of the FP2020 public-sector market was calculated using the most comprehensive available data sources: historical supplier-reported shipment data and RHI shipment data.

Participating Suppliers' Representation of the RHI Market

Within the RHI shipment data, the suppliers participating in the Global Markets Visibility Project held 97 percent or more of the cumulative shipment volumes from 2015 to 2019 for every category with the exception of IUDs and emergency contraceptives, where suppliers held 42 percent and 69 percent of the volumes, respectively. (Exhibit C.1).

The historical supplier-reported shipment data captured a more comprehensive view of the FP2020 public-sector market for female condoms, implants, injectables, IUDs, and orals relative to RHI, and thus served as the primary data source for these product markets. For male condoms, however, RHI is the more comprehensive data source and CHAI leverages RHI for male condom data. The data is quantified by the units of measurement outlined in Exhibit C.2.

EXHIBIT C.1: GLOBAL MARKETS VISIBILITY PROJECT PARTICIPATING SUPPLIER VOLUMES WITHIN RHI BY METHOD FOR THE FP2020 PUBLIC-SECTOR MARKET[24]

METHOD	PARTICIPATING SUPPLIER VOLUMES IN RHI 2015-2019	ALL SUPPLIER VOLUMES IN RHI 2015-2019	% OF TOTAL METHOD VOLUMES
Condoms - Female	96M	100M	97%
Implants	43M	43M	100%
Injectables	261M	261M	100%
IUDs	6M	14M	42%
Orals - Combined & Progestin Only	368M	376M	98%
Orals - Emergency	6M	9M	69%
Total	**781M**	**803M**	**97%**

EXHIBIT C.2: UNIT OF MEASUREMENT

METHOD	UNIT OF MEASURE
Condoms - Female	Piece
Condoms - Male	Piece
Implants	Set
Injectables	Vial
IUDs	Piece
Orals - Combined	Cycle
Orals - Progestin Only	Cycle
Orals - Emergency	Doses

Sources: [1] RHI Shipment Data, September 2020

24. Note that the percent of total method volumes in Exhibit C.1 were calculated prior to rounding.

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

Historical Supplier-Reported Data

To date, the Global Markets Visibility Project has collected historical supplier-reported shipment data from 16 manufacturers – Bayer, Cipla, CR Zizhu, Cupid, Female Health Company, Helm AG, Incepta Pharmaceuticals, Medicines360, Mylan, Merck (MSD), Pfizer, Pregna, PT Tunggal, Shanghai Dahua, SMB, and Techno Drugs. Collectively, the total volumes cover institutional sales (USAID, UNFPA, MSI, etc.) and MOH tenders across five family planning product categories.[25]

Suppliers have cumulatively shipped 103 million female condoms, 49 million implants, 355 million injectables, 43 million IUDs, 658 million orals (combined & progestin only), and 31 million emergency contraceptives from 2015 to 2019.

It is important to note that there were several shipments to procurer (USAID, UNFPA, SMOs) warehouses in non-FP2020 countries, such as Belgium, Denmark, Finland, France, Germany, Netherlands, Norway, Sweden, Switzerland, UK, and USA. Although these volumes were initially shipped to non-FP2020 countries, these shipments were likely to go onto the 69 FP2020 countries. As a result, these non-FP2020 country volumes were included in the total shipments to 69 FP2020 countries after it was confirmed that the specific non-FP2020 country volumes were associated with institutional purchases.

EXHIBIT C.3: GLOBAL MARKETS VISIBILITY PROJECT PARTICIPANTS AND PRODUCTS

MANUFACTURER	CONDOMS - FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Bayer		•	•	•	•
Cipla					•
CR Zizhu					•
Cupid	•				
Female Health Company	•				
Helm AG	•		•	•	
Incepta			•		•
Medcines360				•	
Merck (MSD)		•			•
Mylan			•	•	•
Pfizer			•		
Pregna				•	
PT Tunggal			•		•
Shanghai Dahua		•			
SMB				•	
Techno Drugs		•	•		•

EXHIBIT C.4: SUPPLIER-REPORTED SHIPMENT VOLUMES TO FP2020 COUNTRIES BY METHOD, 2015-2019

METHOD	2015	2016	2017	2018	2019	CUMULATIVE TOTAL 2015-2019
Condoms – Female	25M	22M	22M	13M	20M	103M
Implants	10M	9M	8M	11M	11M	49M
Injectables	97M	50M	59M	81M	68M	355M
IUDs	10M	10M	4M	11M	8M	43M
Orals - Combined & Progestin Only	168M	114M	118M	127M	131M	658M
Orals - Emergency	7M	6M	6M	6M	6M	31M

Note: Cumulative totals calculated using actual, rather than rounded numbers.

Sources: [1] RHI Shipment Data, September 2020

25. Total shipment of oral contraceptives includes combined, progestin-only, and emergency oral contraceptives.

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

CHAI analyzed and assessed the aggregated historical supplier-reported shipment data to confirm the coverage across various FP2020 product markets was greater relative to RHI shipment data for the 69 FP2020 countries. The aim of collecting historical volumes of all institutional purchases and MOH tenders directly from suppliers was to address data gaps observed in RHI shipment data which only capture a subset of procurers who chose to submit historical procurement data. Furthermore, although some countries report national procurements, most national procurements are not reported in the RHI database. The cumulative total from 2015 to 2019 for historical supplier-reported shipment volumes to 69 FP2020 countries and procurer warehouses is greater than RHI in every method.

EXHIBIT C.5: SUPPLIER-REPORTED SHIPMENT VOLUMES AS A PERCENTAGE OF RHI REPORTED* VOLUMES BY METHOD, 2015-2019

METHOD	2015	2016	2017	2018	2019	CUMULATIVE TOTAL 2015-2019
Condoms - Female	113%	101%	118%	73%	108%	103%
Implants	125%	129%	106%	98%	121%	114%
Injectables	184%	119%	122%	143%	109%	136%
IUDs	392%	299%	169%	330%	361%	311%
Orals - Combined & Progestin Only	193%	162%	224%	185%	135%	175%
Orals - Emergency	389%	620%	459%	368%	179%	345%

* Includes all reporting RHI suppliers to FP2020 countries and procurer warehouses

Sources: [1] RHI Shipment Data, September 2020

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

Male Condom Market

Historical RHI shipment data for male condoms was used to capture a more comprehensive view of the family planning market for the 69 FP2020 countries. The report used RHI shipment volume data from 2015 to 2019 and included all male condom shipment volumes to the 69 FP2020 countries as well as volumes associated with procurer warehouses in non-FP2020 focus countries.[26] The male condom market reflected by the RHI data includes at least 18 manufacturers and 6 funding sources.

The historical supplier-reported volumes for female condoms, implants, injectables, IUDs, and orals, together with RHI shipment volumes for male condoms, represent the estimated FP2020 public-sector market from 2015 to 2019.

EXHIBIT C.6: RHI MALE CONDOMS SHIPMENT VOLUMES, 2015-2019

METHOD	2015	2016	2017	2018	2019
Condoms – Male	1.35B	1.15BB	1.09B	1.30B	1.36B

Sources: [1] RHI Shipment Data, September 2020

26. Total yearly volumes are based on the year that the product was shipped.

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

Total FP2020 Public-Sector Market In Terms of CYPs

All shipment volumes were translated to CYPs by dividing shipment volumes by each method's corresponding couple-years of protection (CYP) factor.

All shipment volumes were divided by the corresponding CYP factor published by USAID. CYP is the estimated protection provided by contraceptive methods based upon the volume of all methods sold or distributed for free to clients during that period of time.[27] Because various methods may have different CYPs associated with different sub-types of that method (e.g. there are different CYP factors for three-, four-, and five-year implants) the corresponding CYP of the method sub-type is used. The following exhibit shows the conversion factors used to translate volumes to CYPs.

EXHIBIT C.7: VOLUMES TO CYPS SHIPPED CONVERSION FACTORS, 2015–2019

METHOD	COUPLE-YEARS OF PROTECTION (CYP)
Condoms - Female	120.00
Condoms - Male	120.00
Implants - 3 Year	0.40
Implants - 4 Year	0.31
Implants - 5 Year	0.26
Injectables - 1 month	13.00
Injectables - 2 month	6.00
Injectables - 3 month	4.00
IUDs	0.22
Orals – Combined	15.00
Orals – Progestin Only*	12.00 or 15.00*
Orals – Emergency	20.00

* For the conversion of shipment volumes to CYPs shipped, an oral contraceptive unit that provides 28 days of protection is converted to CYPs using a units-per-CYP conversion factor of 15, while an oral contraceptive unit that provides 35 days of protection is converted to CYPs using a units-per-CYP conversion factor of 12.[28]

Sources: [1] USAID, "Couple-Years of Protection (CYP)," January 2019.

27. USAID, "Couple-Years of Protection (CYP)", available at https://www.usaid.gov/global-health/health-areas/family-planning/couple-years-protection-cyp.

28. As per supplier conversations

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC-SECTOR MARKET

Value of the Total FP2020 Public-Sector Market

The total value of contraceptives was calculated by applying average unit prices to total shipment volumes. Although different prices exist across products and markets, the report estimated implied spend using UNFPA's Contraceptive Price Indicator, given the Contraceptive Price Indicator is publicly available and consistently updated.[29] Finally, the Implant Access Program price of $8.50 was applied to implant volumes from 2013 to 2018. In 2019, the average implant price on the UNFPA Contraceptive Price Indicator dipped below $8.50—accordingly, UNFPA's listed price was used in calculations for 2019. The average price only includes the cost of the product and does not account for additional costs associated with procurement such as testing, insurance, and shipping costs.

EXHIBIT C.8: AVERAGE UNIT PRICE

	PRICE RANGE		2015	2016	2017	2018	2019
Method	Minimum	Maximum	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
Condoms - Female	$0.44	$0.49	$0.49	$0.49	$0.46	$0.47	$0.44
Condoms – Male	$0.02	$0.03	$0.03	$0.03	$0.02	$0.02	$0.02
Implants	$8.37	$8.50	$8.50	$8.50	$8.50	$8.50	$8.37
Injectables	$0.77	$0.82	$0.81	$0.82	$0.79	$0.81	$0.77
IUDs	$0.30	$0.31	$0.30	$0.30	$0.31	$0.30	$0.31
Orals – Combined	$0.23	$0.29	$0.29	$0.26	$0.27	$0.24	$0.23
Orals – Progestin Only	$0.29	$0.34	$0.34	$0.33	$0.32	$0.29	$0.29
Orals - Emergency	$0.26	$0.40	$0.37	$0.35	$0.26	$0.28	$0.40

Notes: [1] For 2015-2018 implants, the Implant Access Program price is used; [2] Otherwise, the price range and unit prices in each year are based on UNFPA's Contraceptive Price Indicator

Sources: [1] UNFPA Contraceptive Price Indicator, 2015 to 2019; [2] IAP Implant Prices.

29. UNFPA, "UNFPA Contraceptive Price Indicator—Year 2019", available at https://www.unfpa.org/resources/contraceptive-price-indicator-year-2019, UNFPA, "UNFPA Contraceptive Price Indicator –Year 2018", available at https://www.unfpa.org/resources/contraceptive-price-indicator-year-2018, UNFPA, "UNFPA Contraceptive Price Indicator –Year 2017", available at https://www.unfpa.org/resources/contraceptive-price-indicator-year-2017, UNFPA, "UNFPA Contraceptive Price Indicator –Year 2016", available at http://www.unfpa.org/resources/contraceptive-price-indicator-2016, UNFPA, "UNFPA Contraceptive Price Indicator—Year 2015"available at https://www.unfpa.org/resources/contraceptive-price-indicator-2015

APPENDIX D – ESTIMATING TOTAL FP2020 DONOR-SPEND VOLUMES

To protect customer confidentiality, suppliers were not asked to disclose customer information associated with shipment volumes. CHAI uses information from USAID, GHSC-PSM, and UNFPA to understand donor spend by the two major institutional procurers of family planning commodities. For more information on each of these data sources, refer to Appendix B.

Going forward, CHAI will continue to work closely with the two major institutional procurers of family planning commodities to ensure the data provided is the most accurate and accessible for the purposes of this report.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

This report has historically included supplementary research and analysis using publicly available data sources in three large markets: Bangladesh, India, and Indonesia.[30] In this section, the analysis is refreshed with the latest data for Bangladesh and India. Publicly available data on government procurement has been limited in Indonesia in recent years, so Indonesia has been removed for now from the market visibility analysis.

Given the limitations of publicly available data sources, this report cannot confirm that these market visibility analyses represent comprehensive coverage of the public-sector markets in India and Bangladesh. Rather, the data is meant to be used as initial confirmation of domestic procurement in these markets, that is not covered by the suppliers participating in this report.

30. Bangladesh and India accounted for a large proportion of the gap between FP2020-reported users of product-based methods and users implied by the shipment data based on country-specific comparisons (per 2016 analysis, when markets visibility analysis was added to the FP Market Report). Note: Indonesia also accounts for a notable proportion of the gap between FP2020-reported users of product-based methods and users implied by the shipment data but is currently excluded from the market visibility analysis given limited publicly-available data on procurement in recent years.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

Bangladesh

The Bangladesh Ministry of Health and Family Welfare (MOHFW) procured 12 million CYPs for the 2019 calendar year, as compared to 17 million CYPs for the 2018 calendar year, 3 million CYPs for the 2017 calendar year, 8M CYPs for the 2016 calendar year, and 13 million CYPs for the 2015 calendar year. Procurement contracts for contraceptives from 2015 to 2019 were awarded primarily to regional and local suppliers, including (but not limited to): Essential Drugs Co., HLL Lifecare Ltd, Khulna Essential, Maneesh Pharmaceuticals Ltd, M/S, Reneta Ltd., Popular Pharmaceuticals Ltd,[32] and Techno Drugs. Only the data from a subset of these manufacturers is included in the supplier shipment data.[33] By applying the same prices[33] used for 2019 supplier shipment volumes to the volumes from the Bangladesh MOHFW procurement data, the implied value from Bangladesh's procurement contracts is estimated to be $38 million for 2019, as compared to the $10 million implied by the 2019 supplier shipment data.

Although procurement of contraceptives has fluctuated in Bangladesh, consumption has remained stable. A review of Bangladesh's supply chain reports revealed that consumption of contraceptive commodities has been fairly consistent—between 10.5 to 13.5 million CYPs—from 2015 to 2019.

This analysis relies on data from the Government of Bangladesh's Ministry of Health and Family Welfare (MOHFW)[34] for 2015, 2016, 2017, 2018 and 2019.[35]

31. In 2017, Incepta Pharmaceuticals supplied the Ministry of Health and Family Welfare (MOHFW) with injectables via Popular Pharmaceuticals Ltd. Source: Incepta Pharmaceuticals.
32. Manufacturers participating in this report include Techno Drugs from Bangladesh and Popular Pharmaceuticals Ltd (via Incepta Pharmaceuticals).
33. To estimate the market value in Bangladesh and India, the report applies the same pricing assumptions used for supplier shipment analyses (from the UNFPA Contraceptive Price Indicator) throughout the markets visibility appendix. Actual pricing may differ in these markets given the different suppliers at play. However, the UNFPA prices have been applied to maintain publicly available, consistently updated pricing assumptions throughout the report.
34. Government of Bangladesh, Ministry of Health and Family Welfare, "MOHFW Supply Chain Management Portal – National Receive Details; Product Group: Contraceptive; Product Name: ALL; Warehouse; ALL" available at: https://scmpbd.org/index.php/wims-reports/national-receive-details
35. The fiscal year for Bangladesh runs from July 1 to June 30 but, for the purposes of this analysis, monthly procurement data was summed for each calendar year for 2015-2019.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

MOHFW SUPPLY CHAIN CONTRACEPTIVE SHIPMENT RECEIPT DETAILS (PUBLICLY-AVAILABLE DATA)

PRODUCT NAME	SUPPLIER NAME	2015	2016	2017	2018	2019
CONDOM	Direct Relief	0	0	0	1,584,000	0
CONDOM	ESSENTIAL DRUGS CO. LTD.	50,000,000	68,850,000	0	56,854,800	11,600,800
CONDOM	KHULNA ESSENTIAL LATEX PLANT (KELP)	100,000,000	35,000,000	0	62,158,800	95,894,000
CONDOM	UNFPA	0	0	1,195,200	10,080,000	0
EMERGENCY CONTRACEPTIVE PILLS (2 TAB/PACK)	M/S, RENETA LTD.	100,000	100,000	0	100,000	100,000
IMPLANT (2 ROD)	SOCIAL MARKETING COMPANY (SMC)	0	17,000	0	0	0
IMPLANT (2 ROD)	TECHNO DRUGS Ltd	0	0	0	385,000	429,054
IMPLANT (2 ROD)	USAID	0	0	35,000	0	0
IMPLANT (SINGLE ROD)	JAMES INTERNATIONAL	0	5	2,880	0	0
IMPLANT (SINGLE ROD)	Merck Sharp & Dohme B.V(MSD B.V.).	0	150,000	3,000	0	0
IMPLANT (SINGLE ROD)	MSD-NV Organon, Organon(India) Private Ltd.	50,000	0	199,980	0	0
IMPLANT (SINGLE ROD)	UNFPA	0	0	0	200,000	5,000
INJECTABLES (DMPA-IM)	Helm-AG	14,000,000	0	0	0	0
INJECTABLES (DMPA-IM)	Popular Pharmaceuticals Ltd.	0	0	1,000,000	1,000,000	0
INJECTABLES (DMPA-IM)	TECHNO DRUGS Ltd	2,500,000	8,100,000	5,000,000	18,250,000	8,230,000
INJECTABLES (DMPA-IM)	UNFPA	0	0	299,997	0	0
INJECTABLES (DMPA-IM)	USAID	0	0	1,000,000	914,800	0
IUD (CT-380A)	IPAS Bangladesh	0	0	0	9,500	0
IUD (CT-380A)	MARIE STOPES CLINIC	0	0	65,000	56,000	0
IUD (CT-380A)	SARBAN INTERNATIONAL LTD.	400,000	0	0	0	0
IUD (CT-380A)	SMB Corporation Of India	0	0	0	450,000	0
IUD (CT-380A)	SOCIAL MARKETING COMPANY (SMC)	73,679	0	0	0	0
IUD (CT-380A)	UNFPA	0	0	0	200,000	0
ORAL CONTRACEPTIVE PILL (SHUKHI)	HLL Lifecare Limited	22,469,025	0	0	0	0
ORAL CONTRACEPTIVE PILL (SHUKHI)	Maneesh Pharmaceuticals Limited	22,289,280	0	0	0	0
ORAL CONTRACEPTIVE PILL (SHUKHI)	M/S, RENETA LTD.	20,730,975	54,750,000	0	54,800,125	110,000,001
ORAL CONTRACEPTIVE PILL (SHUKHI)	Popular Pharmaceuticals Ltd.	10,800,000	14,250,000	0	16,700,000	0
ORAL CONTRACEPTIVE PILL (SHUKHI)	TECHNO DRUGS Ltd	1,710,720	0	0	16,700,000	0
ORAL PILL APON	M/S, RENETA LTD.	1,000,000	3,500,000	750,000	4,000,000	1,000,000

Source: Bangladesh MOHFW, Supply Chain Management Portal, 2020.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

India

Based on India's Ministry of Health and Family Welfare (MOHFW)[36] Annual Report for the 2019-2020 fiscal year,[37] CYPs procured from product-based methods[38] totaled 32 million. This number represents a decrease of 19M CYPs, relative to the 51M CYPs procured in the 2018- 19 fiscal year. However, procurement in the 2019-20 fiscal year was closer to the 2015-16 to 2019-20 fiscal year average of 36M CYPs procured annually.

The majority of the 2019-20 fiscal year decrease in CYPs (relative to the 2018-19 fiscal year) is attributable to a drop in IUDs procured. CYPs procured from IUDs were 22M in the 2019-20 fiscal year, down from 41M in the 2018-19 fiscal year. Decreases in oral contraceptive procurement also contributed to the overall drop in CYPs.[39] However, these decreases were partly offset by increases in CYPs procured from male condoms and injectables. Sterilizations also decreased to 1.2M in the 2019-20 fiscal year, down from 3.5M in the 2018-19 fiscal year.[40]

Although the MOHFW annual report shipment volumes are based on a fiscal year schedule, instead of the calendar years used in this report, for simplicity the same prices (in Exhibit C.8) were used to estimate the implied annual market value for supplier shipment and MOHFW procurement volumes. These calculations show MOHFW procurement values of approximately $36 million in the 2018-19 fiscal year and $33 million in the 2019-20 fiscal year, compared to the $4 million and $1 million implied by the 2018 and 2019 supplier shipment data. The MOHFW procurement data shows that market value dipped only slightly, despite a comparatively large CYP decrease of 19M from the 2018-19 to 2019-20 fiscal years. This trend is largely due to the large decrease in IUD volumes from 2018 to 2019 (a 45 percent decrease) as IUDs have a large CYP factor but are relatively inexpensive.

36. Government of India, Ministry of Health and Family Welfare, "Annual Report of Department of Health & Family Welfare for the year of 2019-20" ,"Annual Report of Department of Health & Family Welfare for the year of 2018-19", "Annual Report of Department of Health & Family Welfare for the year of 2017-18", "Annual Report of Department of Health & Family Welfare for the year of 2016-17", "Annual Report of Department of Health & Family Welfare for the year of 2015-16"available at: https://main.mohfw.gov.in/documents/publication
37. The fiscal year for India runs from April 1 to March 31.
38. Only modern contraceptive methods from India's MOHFW reports, including male condoms, injectables, IUDs, orals, and emergency contraception, are included in this analysis.
39. Note that the Indian MOHFW procures a weekly oral contraceptive that is sold under the names Saheli and Centchroman. USAID does not list a CYP factor for this method, so tthe market visibility analysis uses an approximate CYP factor of 9 strips (with 8 pills per strip) per year, based on demand estimation guidelines for clinics from the Indian MOHFW in the "Reference Manual for Oral Contraceptive Pills" from March 2016: https://nhm.gov.in/images/pdf/programmes/family-planing/guidelines/Reference_Manual_Oral_Pills.pdf. Prices for the method were calculated by dividing the listed value and quantity of Centchroman under India's Free Supply Scheme to estimate price per year. Given a lack of data in 2015, 2016 prices were applied for that year.
40. Sterilizations are not included in CYP and market value calculations, as they are not a product-based method of contraception. However, they are included in the MOHFW report: Government of India, Ministry of Health and Family Welfare, "Annual Report of Department of Health & Family Welfare for the year of 2019-20."

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

ANNUAL REPORTS OF DEPARTMENT OF HEALTH & FAMILY WELFARE (INCLUDES FULL FISCAL YEARS 2015-16 TO 2019-20)

QUANTITIES SUPPLIED TO STATES/UTS (PUBLICLY-AVAILABLE DATA)

CONTRACEPTIVES	2015-16	2016-17	2017-18	2018-19	2019-20*
Condoms (In million pieces)	394.0	432.8	526.8	0.0	378.1
Oral Pills (In lakh cycles)	361.2	312.0	275.3	394.4	384.3
IUDs (In lakh pieces)	60.4	48.1	22.6	88.5	48.3
Tubal Rings (In lakh pairs)	19.0	6.4	14.6	12.4	10.3
Emergency Contraceptive Pills (in lakh packs)	86.1	60.8	50.4	128.0	117.8
Centchroman Contraceptive Pill (Lakh Strips)	0.0	7.1	24.0	170.3	110.3
Injectable Contraceptive (Lakh Doses)	0.0	0.0	27.0	0.0	13.5
Pregnancy Test Kits (in lakhs)	100.1	124.6	180.4	187.0	205.8

EXHIBIT E.2.2 SOCIAL MARKETING SALES OF CONTRACEPTIVES (PUBLICLY-AVAILABLE DATA)

CONTRACEPTIVES	2015-16	2016-17	2017-18	2018-19	2019-20*
Condoms (Million pieces)	482.2	399.0	483.2	459.5	149.5
Oral Pills (Social Marketing) (lakh cycles)	152.8	194.3	205.3	159.2	34.7
SAHELI (in Lakh tablets)	311.2	321.8	321.8	77.5	0.0

*Figures are Provisional

APPENDIX F – KEY TERMS AND DEFINITIONS

CYP
Couple-Years of Protection (CYP) is the estimated protection provided by contraceptive methods during a one-year period (e.g. 120 condoms provide a couple protection for one year).

CYP mix
CYP mix refers to the percentage distribution of CYPs shipped by method.

Value
Value refers to the supplier-reported shipment volume multiplied by the estimated price (from the UNFPA Contraceptive Price Indicator) for specific years.

Market Share
Market share is the percentage of total value of shipment volumes in a market captured by a certain contraceptive method.

Shipments or Shipment Volumes
Shipment volumes refers to the amount of a particular contraceptive method that has been transported.

Total FP2020 Public-Sector Market
The total FP2020 public-sector market is based on volumes purchased by institutional buyers and MOH or government-affiliated procurers based on RHI data (male condoms) and historical supplier-reported shipment data (female condoms, implants, injectables, IUDs, and orals) for the 69 FP2020 focus countries, defined as countries with a 2010 gross national per capita annual income less than or equal to $2,500. Although South Africa made an FP2020 commitment, its GNI was greater than $2,500, and thus South Africa is not included in the FP2020 public-sector market calculations.

APPENDIX G – ACRONYMS

CHAI	CLINTON HEALTH ACCESS INITIATIVE
CYP	COUPLE-YEARS OF PROTECTION
FP	FAMILY PLANNING
FP2020	FAMILY PLANNING 2020
GEMS	GENERIC MANUFACTURERS FOR REPRODUCTIVE HEALTH
IUD	INTRA-UTERINE DEVICE
LARC	LONG-ACTING REVERSIBLE CONTRACEPTIVES
MOH	MINISTRY OF HEALTH
MOHFW	MINISTRY OF HEALTH AND FAMILY WELFARE
RHI	REPRODUCTIVE HEALTH INTERCHANGE
RHSC	REPRODUCTIVE HEALTH SUPPLIES COALITION
UNFPA	UNITED NATIONS POPULATION FUND
USAID	UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT

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*HELM AG was a participating supplier in the FP2020 Global Markets Visibility Project for the FP 2015, 2016 and 2017 Market Reports. In September 2017, HELM AG sold its wholly-owned subsidiary company, HELM Medical GmbH, to Sanavita Pharmaceuticals GmbH. Refer to page 16 for more information on HELM AG and other participating suppliers.
** CHAI began collecting data directly from suppliers in the GEMS Caucus, starting with the 2018 shipment data.