FAMILY PLANNING MARKET REPORT

DECEMBER 2021

CLINTON HEALTH ACCESS INITIATIVE

Reproductive Health SUPPLIES COALITION

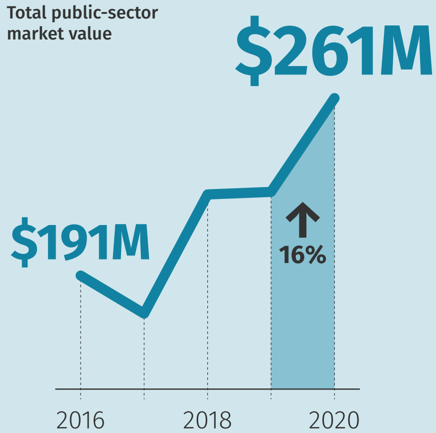
THE STATE OF FAMILY PLANNING IN 2020	**3**
SUPPLIER SHIPMENT ANALYSIS	**4**
DONOR SPEND ANALYSIS	**14**
HIGHLIGHTS FROM DISCUSSION WITH KEY STAKEHOLDERS	**17**
GLOBAL MARKETS VISIBILITY PROJECT ACKNOWLEDGEMENTS	**18**
APPENDICES	**20**
ACKNOWLEDGEMENTS	**43**

THE STATE OF FAMILY PLANNING IN 2020

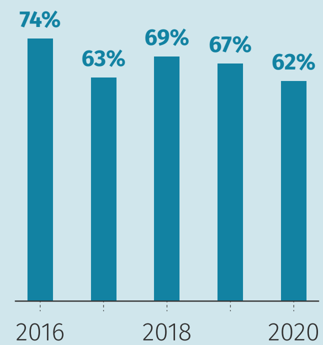
The public-sector market in the 69 FP2020 focus countries reached a five-year high in 2020

Notable market trends

Total public-sector market value



Long-acting reversible contraceptives (LARCs) as a % of couple years of protection (CYPs) shipped from 2016-2020



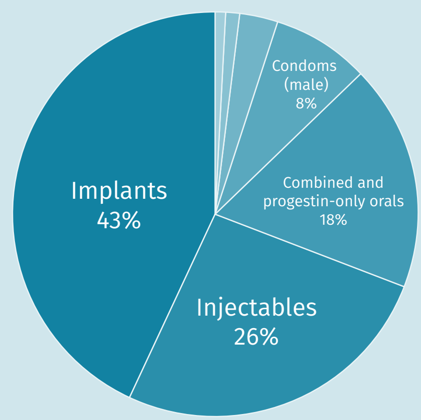
Notable product trends

29%
Increase in market value of combined and progestin-only orals from 2019 to 2020

26%
Increase in market value of injectables from 2019 to 2020

20%
Increase in market value of implants from 2019 to 2020

Market share per method based on value in 2020



Donor spend analysis

$170M

UNFPA's total spend on contraceptive procurement in FY2020, an increase of 5% from FY2019

$45M

USAID's total spend on contraceptive procurement in FY2020, an increase of 20% from FY2019

SUPPLIER SHIPMENT ANALYSIS

The 2021 Family Planning Market Report provides visibility into the public-sector contraceptive market in the 69 FP2020 focus countries[1] from 2016-2020. The public-sector volumes that are included in this report's scope are those purchased by institutional buyers (such as USAID, UNFPA, and social marketing organizations), ministries of health, and government-affiliated procurers for the 69 FP2020 focus countries. The Family Planning Market Report analyzes procurement trends for all product-based modern methods of contraception, based on historical supplier-reported shipment data. This shipment data is collected from 17 suppliers, for methods including female condoms, implants, injectables, IUDs (copper)[2], oral contraceptives (combined and progestin-only), and emergency oral contraceptives. Findings for male condoms are based on shipment data from the Reproductive Health Supplies Visualizer (RH Viz).[3] Shipment data provides insights into the historical procurement of contraceptive products, but is not necessarily equivalent to demand for contraceptives, given procurement is shaped by key factors such as available funding and production capacity.

From 2019 to 2020, the value of the FP2020 public-sector market increased by 16 percent, reaching a five-year high in market value despite the challenges presented by the COVID-19 pandemic. Market volumes also increased during this period, rising by 23 percent. Due to method-specific procurement trends, couple years of protection (CYPs)[4] shipped to the FP2020 public-sector market remained constant from 2019 to 2020.

The growth of the FP2020 public-sector market from 2019 to 2020 was driven by increased procurement volumes for implants, injectables, and oral contraceptives. CYPs shipped remained constant from 2019 to 2020; however, short-term methods represented a relatively greater proportion of the CYP mix in 202o than in 2019. Nevertheless, long-acting reversible methods of contraception (LARCs, i.e., implants and IUDs) continued to comprise the majority of CYPs shipped to the FP2020 public-sector market in 2020.

Despite the COVID-19 pandemic, large-scale procurement disruptions did not take place in 2020.

This section analyzes trends in shipment volumes, value in USD, and CYPs shipped in the FP2020 public-sector market from 2016 to 2020.

THE TOTAL VALUE OF THE FP2020 PUBLIC-SECTOR MARKET REACHED A FIVE-YEAR HIGH OF $261M IN 2020. THE NUMBER OF CYPS SHIPPED REMAINED STABLE FROM 2019 TO 2020, DUE TO CHANGES IN THE MIX OF CONTRACEPTIVES PROCURED.

Notable Market Trends

The total value of the public-sector contraceptive market in the 69 FP2020 focus countries increased from $191 million[5] in 2016 to $261 million in 2020 (Exhibit 1). Relative increases and decreases in market value were observed through the previous five-year period, with the 2017 market value of $176 million representing the lowest market value seen during that period (Exhibit 1). Overall, the size of the FP2020 public-sector market was $70 million larger in 2020 than in 2016, with the largest increases in market value occurring from 2017 to 2018 (+$47 million) and from 2019 to 2020 (+$37 million) (Exhibit 1).

Despite the 16 percent increase in market value observed from 2019 to 2020, the quantity of CYPs shipped remained constant at 112 million in both 2019 and 2020 (Exhibits 1, 3). While the FP2020 public-sector market value increased, the number of CYPs shipped from 2019 to 2020 remained stable. This difference is due to shifts in the mix of contraceptives procured towards methods with a higher cost per CYP. IUD procurement decreased from 2019 to 2020, reducing the number of CYPs shipped by 14 million (Exhibit 3). Although this decrease was partially offset by an increase in CYPs shipped from implants (+8 million), short-term methods made up a higher proportion of the CYP mix overall in 2020 than in 2019 (Exhibits 3, 5). Since short-term methods tend to be relatively more expensive per CYP provided than LARCs, the number of CYPs shipped remained stable despite the increase seen in market value from 2019 to 2020 (Exhibits 3, 4).

In terms of regional trends from 2016 to 2020, Sub-Saharan Africa's market share stayed largely constant, ranging from a low of 64 percent in 2017 to a high of

1 The 69 FP2020 countries (defined as countries with a 2010 gross national income per capita less than or equal to $2,500) emerged from the 2012 London Summit on Family Planning and have historically been the focus of the Family Planning Market Report. The sexual and reproductive health (SRH) community is currently transitioning from the FP2020 to the FP2030 architecture, in which any country will be able to make a human rights-based commitment to sexual and reproductive health. Data collection for this year's 2020 Family Planning Market Report took place prior to the announcement of the updated FP2030 architecture; accordingly, the Family Planning Market Report focuses on the 69 FP2020 focus countries. CHAI and RHSC will explore how to refine country scope for future report publications, in order to reflect the transition to the FP2030 architecture.

2 IUD is an abbreviation for an intra-uterine device; all IUD quantities shown in this report refer to copper IUDs. Data collection for the 2020 and 2021 Family Planning Market Reports did include the hormonal IUD. However, a public price for the hormonal IUD is unavailable in the 2020 UNFPA Contraceptive Price Indicator and therefore hormonal IUD volumes are not included in the report. Hormonal IUD shipment data will be included in future Market Reports once price points become publicly available on the UNFPA Contraceptive Price Indicator and data can be aggregated accordingly.

3 This report has historically used data from the Reproductive Health Interchange (RHI) to estimate the size of the male condom market. Since the male condom market is quite fragmented, RHI historically has provided greater visibility for that particular method. Additionally, RHI data has historically been used to assess the relative visibility the Family Planning Market Report provides across all methods. In September 2020, however, the SRH community transitioned away from the RHI platform to the Reproductive Health Supplies Visualizer (RH Viz). The 2020 Family Planning Market Report, therefore, now utilizes RH Viz data for male condom volumes and market visibility calculations. See Appendix C for further details.

4 Couple Years of Protection (CYP) is the estimated protection provided by contraceptive methods during a one-year period (for example, 120 condoms provide a couple protection for one year). For all CYP calculations, this report utilizes the CYP factors most recently published by USAID. See Appendix C for further details.

5 The currency reported is in US dollars, unless otherwise noted.

72 percent in 2019 (Exhibit 7). Market share in the Asia and Pacific region increased slightly (by three percent) from 2019 to 2020 (Exhibit 7). Within the FP2020 public-sector market captured in this report[6], the 10 largest countries (in terms of market value) represented over 50 percent of the overall market value in 2020, with Bangladesh[7] comprising approximately 12 percent of the FP2020 public-sector market (Exhibits 8, 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 each year in the 2016 to 2020 period.

Notable Product Trends

INCREASED MARKET VALUE WAS DRIVEN BY GROWTH IN THE INJECTABLE, IMPLANT, AND ORAL CONTRACEPTIVE CATEGORIES. CYPS SHIPPED REMAINED RELATIVELY FLAT GIVEN LOWER VOLUMES OF (COPPER) IUDS IN 2020.

Although overall market value grew, IUD volumes (comprised of the copper IUD only, as per footnote 2) declined for a second consecutive year in 2020, decreasing by 34 percent compared to 2019 volumes (Exhibit 2). This decrease in volumes only caused a small decline in the 2020 overall market value (-$1 million) as the IUD has a low unit cost (Exhibits 1, 4). However, since the IUD has the highest CYP per unit of any method in this report, the decrease in IUD volumes counter-balanced increases in CYPs shipped from other methods, keeping the overall number of CYPs shipped flat from 2019 to 2020 (Exhibits 4,3). The IUD volume decline was largely driven by decreased procurement in Pakistan, Uzbekistan, and India. All three countries procured notably higher volumes of the IUD in 2019, indicating that some of the decline in IUD volumes may have been cyclical and related to procurement patterns.

The market value of injectables increased by 26 percent from 2019 to 2020, reaching a five-year high of $68 million (Exhibit 1). Similarly, the market value of combined and progestin-only orals increased by 29 percent from 2019 to 2020, reaching its highest value ($47 million) throughout the period (Exhibit 1). Although oral contraceptive procurement increased across several countries, the largest increase was observed in Bangladesh. Given the robust domestic procurement environment in Bangladesh, this uptick in oral contraceptive volumes in Bangladesh could perhaps reflect that the suppliers included in the Family Planning Market Report captured further market share in the country in 2020.

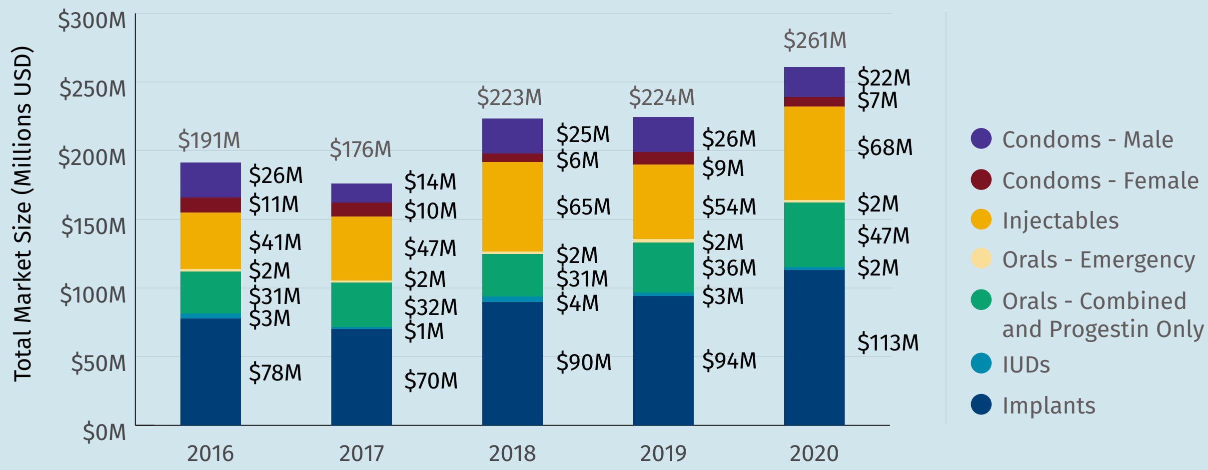
Finally, implant market value increased by 20 percent from 2019 to 2020, reaching another five-year high, despite capacity restrictions at some manufacturers in 2020 (Exhibit 1). Implants alone contributed 43 percent of the FP2020 public-sector market value in 2020 (Exhibit 6). The implant segment grew despite some capacity restrictions in 2020, thus it is likely that implant volumes may have been even larger if unhindered by these limitations. Increased spend on implant procurement is also notable because in 2020, unit prices for implants fell to an average of $8.261[8], down from $8.367 in 2019, based on the UNFPA Contraceptive Price Indicator. This trend is in part attributable to the increased number of quality-assured implant suppliers on the market.

6 Private-sector contraceptive use does not factor into these market share numbers. Additionally, 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 also 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.

7 As noted in Footnote 6, the Family Planning Market Report provides visibility into contraceptive procurement trends in Bangladesh with data from the participating suppliers. However, there may be additional suppliers active in the Bangladesh market, beyond the participating suppliers captured in the Family Planning Market Report (see Appendix E for more details). Therefore, although Bangladesh comprised ~12 percent of the FP2020 public-sector market value in this report for 2020 (up from ~4 percent in 2019), that may or may not indicate that overall public-sector contraceptive procurement increased in size in Bangladesh when all participating and non-participating suppliers are considered. For example, if the suppliers participating in the Family Planning Market Report captured relatively larger market share in Bangladesh in one year than they did previously, then the size of the Bangladesh market would appear larger in the Family Planning Market Report, even if overall public-sector contraceptive procurement in Bangladesh were actually to stay flat in total when looking across all suppliers, some of whom may or may not participate in the Family Planning Market Report.

8 Note the $8.261 and $8.367 figures are 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 down 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 2020 and 2019 UNFPA Contraceptive Price Indicators are available here:
https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptives_Price_Indicator_2020.pdf
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)



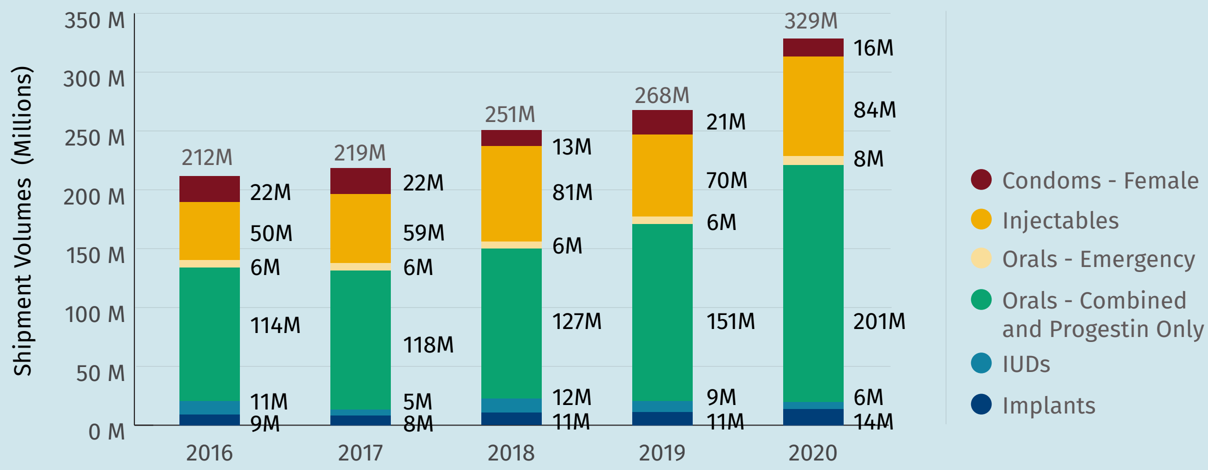
Method	Year over year 2019-2020*	Compound annual growth rate 2016-2020**
Condoms- Male	-14%	-4%
Condoms- Female	-26%	-11%
Injectables	26%	14%
Orals- Emergency	-15%	-1%
Orals- Combined & Progestin Only	29%	11%
IUDs	-20%	-9%
Implants	20%	10%
Total	**16%**	**8%**

*Year over year (YOY): change in the value of the FP2020 public-sector market between 2019-20
**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. Additionally, year over year and compound annual growth rate numbers were calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2021; [3] UNFPA Contraceptive Price Indicator, 2016–2020; [4] IAP Implant Price.

Exhibit 2: Total FP2020 market volumes (male condoms excluded*)



Method	Year over year 2019-2020	Compound annual growth rate 2016-2020
Condoms- Female	-23%	-8%
Injectables	20%	14%
Orals- Emergency	31%	7%
Orals- Combined & Progestin Only	34%	15%
IUDs	-34%	-14%
Implants	22%	11%
Total	**23%**	**12%**

Male condom shipment values (billions)

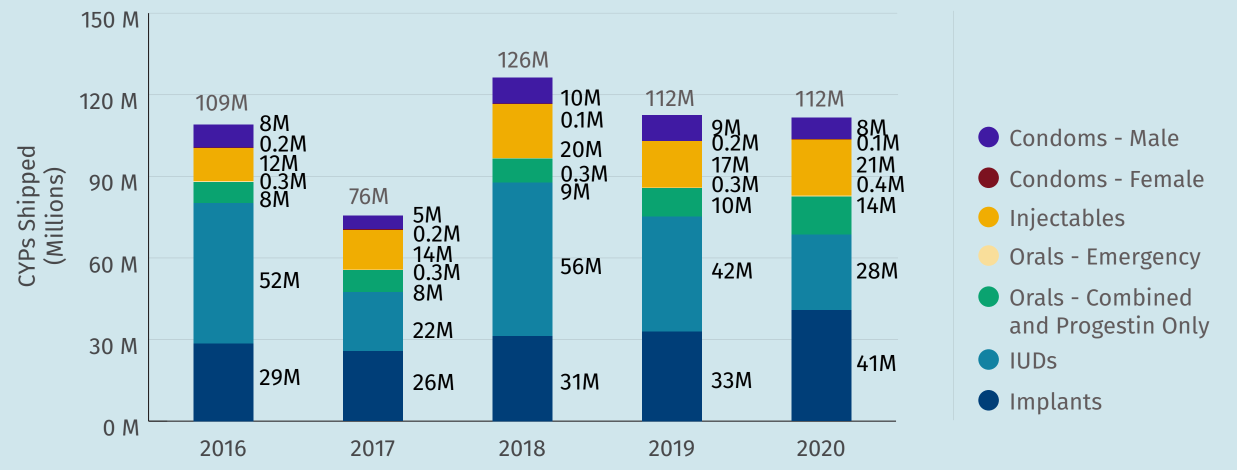
2016	2017	2018	2019	2020	Year over year 2019-2020	Compound annual growth rate 2016-2020
1.02B	0.60B	1.15B	1.13B	0.96B	-15%	-1%

*Male condoms are shown separately because the source of the shipment data is RH Viz, 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. Additionally, year over year and compound annual growth rate numbers were calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated informatio.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2021.

Exhibit 3: CYPs shipped to the FP2020 public-sector market



Method	Year over year 2019-2020	Compound annual growth rate 2016-2020
Condoms- Male	-15%	-1%
Condoms- Female	-23%	-8%
Injectables	21%	14%
Orals- Emergency	31%	7%
Orals- Combined & Progestin Only	33%	15%
IUDs	-34%	-14%
Implants	24%	9%
Total	**-1%**	**1%**

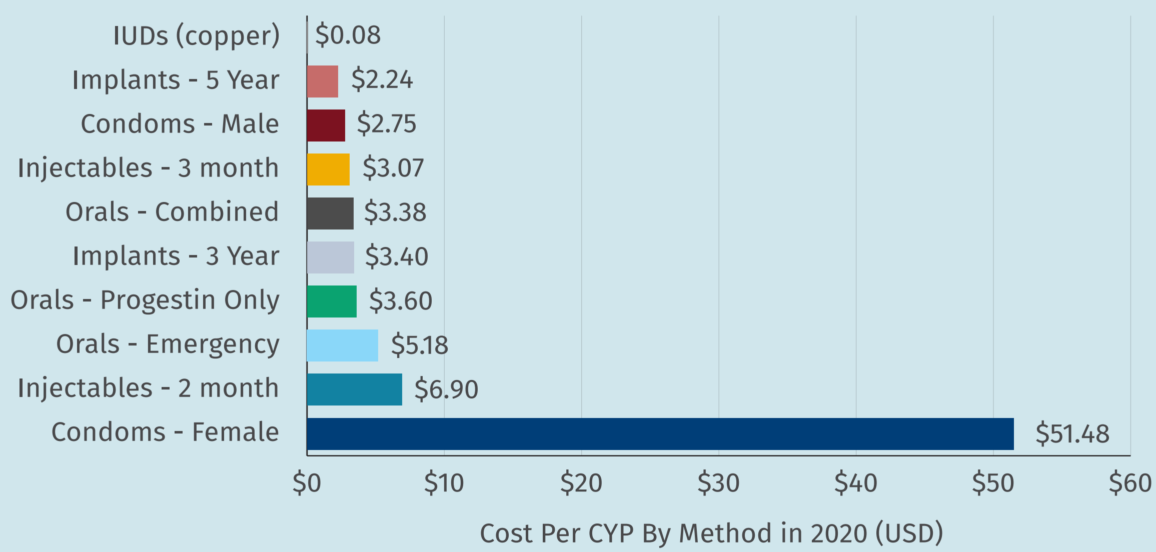
Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Additionally, year over year and compound annual growth rate numbers were calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2021; [3] USAID, "Couple-Years of Protection (CYP)".

Exhibit 4A: Cost per CYP by method per duration of use (USD)

Method	Units per CYP	Unit Cost					Cost per CYP				
		2016	2017	2018	2019	2020	2016	2017	2018	2019	2020
Condoms - Female	120.00	$0.49	$0.46	$0.47	$0.44	$0.43	$59.28	$55.32	$56.88	$53.28	$51.48
Condoms - Male	120.00	$0.03	$0.02	$0.02	$0.02	$0.02	$3.03	$2.71	$2.64	$2.72	$2.75
Injectables - 1 month	13.00	$0.85	$0.85	$0.85	N/A*	N/A*	$11.05	$11.05	$11.05	N/A*	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	$0.80	$0.77	$0.79	$0.75	$0.77	$3.20	$3.09	$3.16	$3.00	$3.07
Orals - Combined	15.00	$0.26	$0.27	$0.24	$0.23	$0.23	$3.95	$4.01	$3.56	$3.51	$3.38
Orals - Progestin Only	12.00	$0.33	$0.32	$0.29	$0.29	$0.30	$3.94	$3.80	$3.52	$3.47	$3.60
Orals - Emergency	20.00	$0.35	$0.26	$0.28	$0.40	$0.26	$7.02	$5.14	$5.52	$7.98	$5.18
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 (copper)	0.22	$0.30	$0.31	$0.30	$0.31	$0.37	$0.06	$0.07	$0.07	$0.07	$0.08

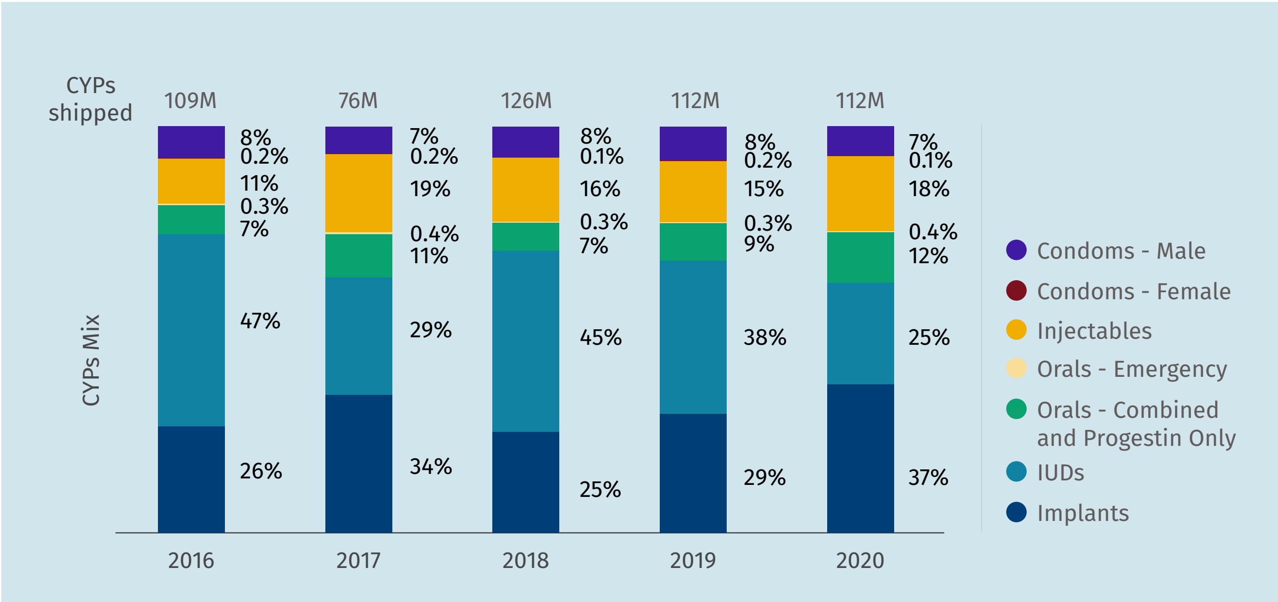
Exhibit 4B: Cost per CYP by method in 2020 (USD)



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

Sources: [1] UNFPA Contraceptive Price Indicator, 2016–2020; [2] USAID, “Couple-Years of Protection (CYP)”, [3] IAP Implant Price.

Exhibit 5: CYP mix (in terms of CYPs shipped) in the FP2020 public-sector market

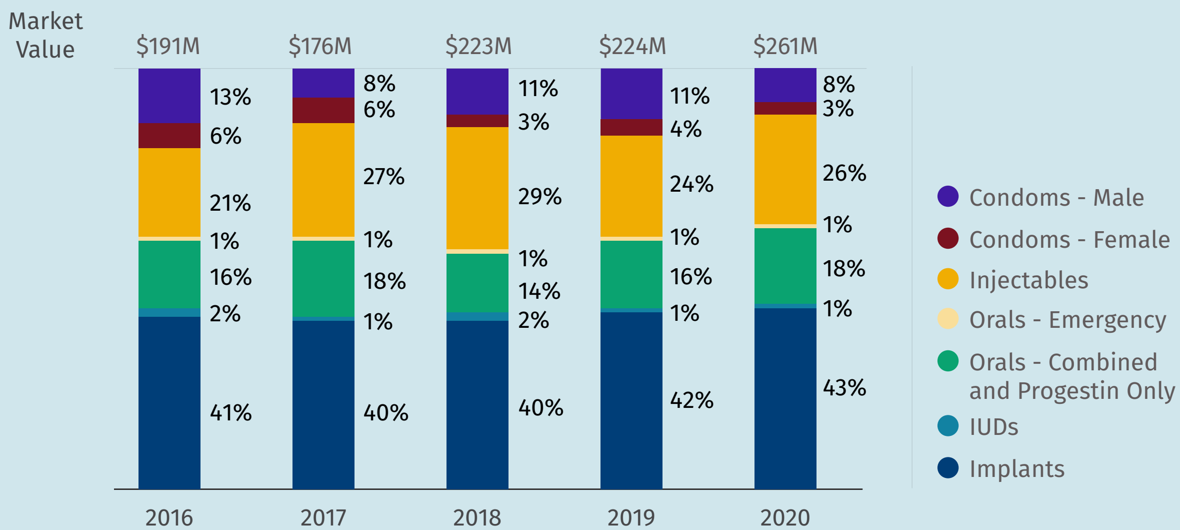


LARCs as a percent of CYPs shipped	2016	2017	2018	2019	2020
	74%	**63%**	**69%**	**67%**	**62%**

Note: Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information. LARCs as a percent of CYPs shipped were calculated using actual values, not the rounded values in the chart.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2021; [3] UNFPA Contraceptive Price Indicator, 2016–2020; [4] USAID, “Couple-Years of Protection (CYP)”.

Exhibit 6: Market share per method in the FP2020 public-sector market (USD)

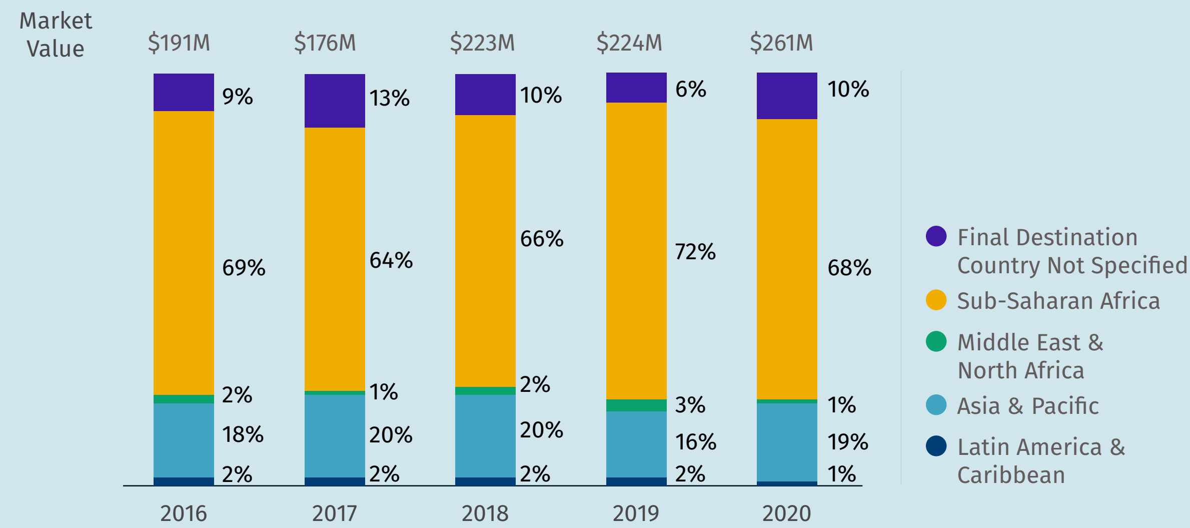


LARCs as a percent of market value	2016	2017	2018	2019	2020
	42%	**41%**	**42%**	**43%**	**44%**

Note: Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information. LARCs as a percent of market share were calculated using actual values, not the rounded values in the chart.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2021; [3] UNFPA Contraceptive Price Indicator, 2016–2020; [4] IAP Implant Price.

Exhibit 7: Market share of FP2020 public sector by region (USD)



Note: Public-sector, regional market share shown in the graph above is influenced by the relative distribution of FP2020 countries, the majority of which are located in Sub-Saharan Africa. Only a small number of countries from both the Latin America & Caribbean and Middle East & North Africa regions are included among the 69 FP2020 focus countries; trends across the whole of these regions are not captured above.

"Destination country not specified" indicates that shipments were received in warehouses for later distribution to the FP2020 countries. Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021; [3] UNFPA Contraceptive Price Indicator, 2016–2020; [4] IAP Implant Price.

Exhibit 8: Top ten countries in terms of value, 2020

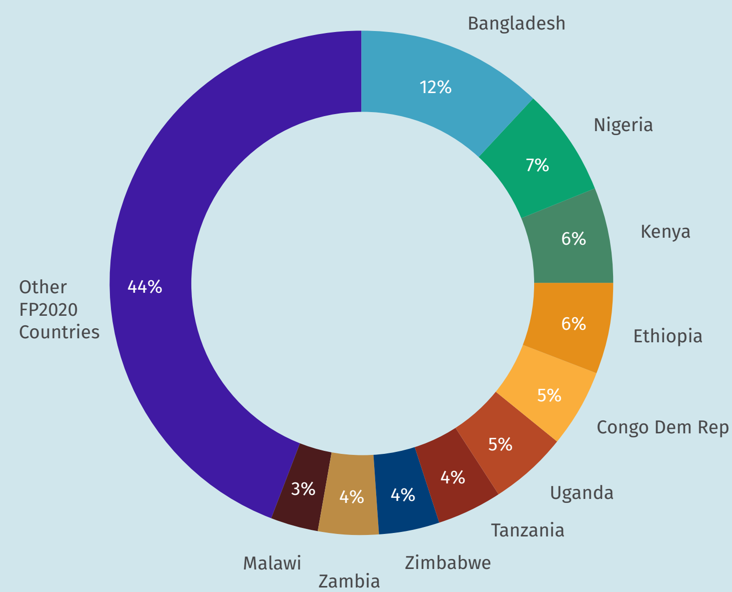
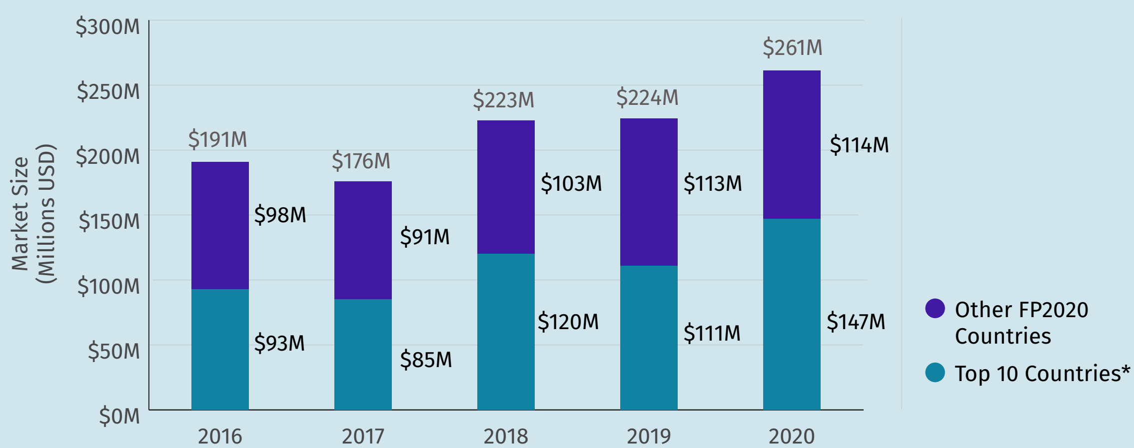


Exhibit 9: Value of 10 largest FP2020 public-sector countries compared to value of all other countries combined



* Top countries in this graph are defined by 2020 data and, in alphabetical order are: Bangladesh, Congo Dem Rep, Ethiopia, Kenya, Malawi, Nigeria, Tanzania, Uganda, Zambia, and Zimbabwe.

Note: Some differences exist in the historical data for 2016-2019 in this version of the report versus previous versions, due to the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz Shipment Data, retrieved August 2021; [3] UNFPA Contraceptive Price Indicator, 2016–2020; [4] IAP Implant Price.

DONOR SPEND ANALYSIS

This section focuses on data[9] from the Procurement Services Branch of UNFPA and USAID's "Overview of Contraceptive and Condom Shipments" report and is aimed at understanding the historical contraceptive procurement spend by the two major institutional procurers in the public-sector markets of the 69 FP2020 focus countries.

UNFPA'S SPEND ON CONTRACEPTIVES REACHED ANOTHER HISTORIC HIGH IN FY2020, HAVING MORE THAN DOUBLED SINCE FY2016. USAID'S SPEND ALSO INCREASED FROM FY2019 TO FY2020 AND HAS BEEN RELATIVELY STABLE BETWEEN FY2016 AND FY2020.

UNFPA's total spend on contraceptive procurement (looking across both UNFPA program procurement as well as third-party procurement) increased by 5 percent from FY2019 to FY2020 to reach a total of $170 million (Exhibit 10). UNFPA's FY2020 spend on contraceptive procurement was the highest in five years, having increased by $91 million since FY2016 (Exhibit 10). Although UNFPA did initially report some disruptions, the overall impact of COVID-19 on contraceptive procurement was relatively minor. UNFPA worked with governments and missions to underscore the essential nature of contraceptives, and to unblock supply chain bottlenecks. Although overall UNFPA contraceptive procurement spend increased from $162M in FY2019 to $170M in FY2020, third-party procurement as a percent of this total UNFPA spend decreased from 17 percent in FY2019 to 9 percent in FY2020. Specifically, third-party procurement decreased by approximately $13 million (-46 percent) while program procurement increased by approximately $21 million (+16 percent) from FY2019 to FY2020.

For USAID, the annual value of contraceptive procurement in FY2020, excluding male and female condoms,[10] was $45 million, up 20 percent from FY2019 (Exhibit 11).[11] USAID minimized disruptions and the impact of COVID-19 on contraceptive procurement and delivery in 2020 by strategically deploying virtual formats and staff on the ground where possible, as well as utilizing regional distribution centers to alleviate disruptions in the production and shipping of sexual and reproductive health (SRH) commodities.[12] USAID's spend on contraceptive procurement throughout FY2016-FY2020 has been stable, and remains both decentralized and determined by missions in countries. USAID missions in certain countries may be submitting fewer requests for contraceptive procurement funding as USAID continues to implement its "Journey to Self-Reliance".[13]

9 Prior to the publication of the 2018 Family Planning Market Report, CHAI and RHSC leveraged data from RHI for donor spend analysis. The 2018, 2019, 2020, and 2021 Family Planning Market Reports have been updated to rely on data from the Procurement Services Branch of UNFPA and from USAID's "Overview of Contraceptive and Condom Shipments" reports.

10 USAID data on contraceptive shipments is taken from the "Overview of Contraceptive and Condom Shipments FY2020 report." The FY2020 report is reflective of family planning funding and does not include HIV/AIDs funded condoms; thus, we have excluded female and male condom values for FY2016 to FY2020 to compare a consistent data set across years. The USAID report is available here: **https://www.usaid.gov/sites/default/files/documents/CC_FY20.pdf**

11 USAID Fiscal Year (FY) runs from Oct. 1 to Sept. 30. Since FY2018, USAID has shared data in the "Overview of Contraceptive and Condom Shipment" reports based on the year in which orders are delivered, rather than shipped to countries.

12 Context from USAID's "Overview of Contraceptive and Condom Shipments FY2020" report.

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. Additional information is available here: **https://www.usaid.gov/selfreliance.**

Exhibit 10: UNFPA procurement value – contraceptives to FP2020 countries (in USD)

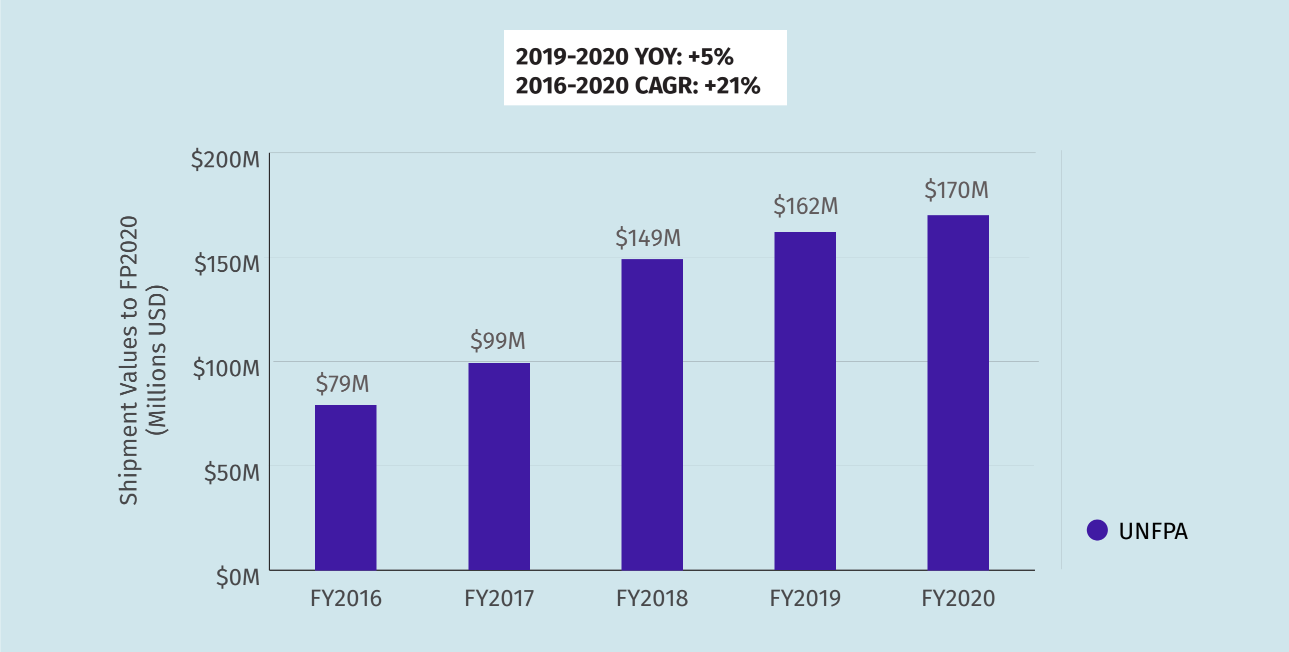
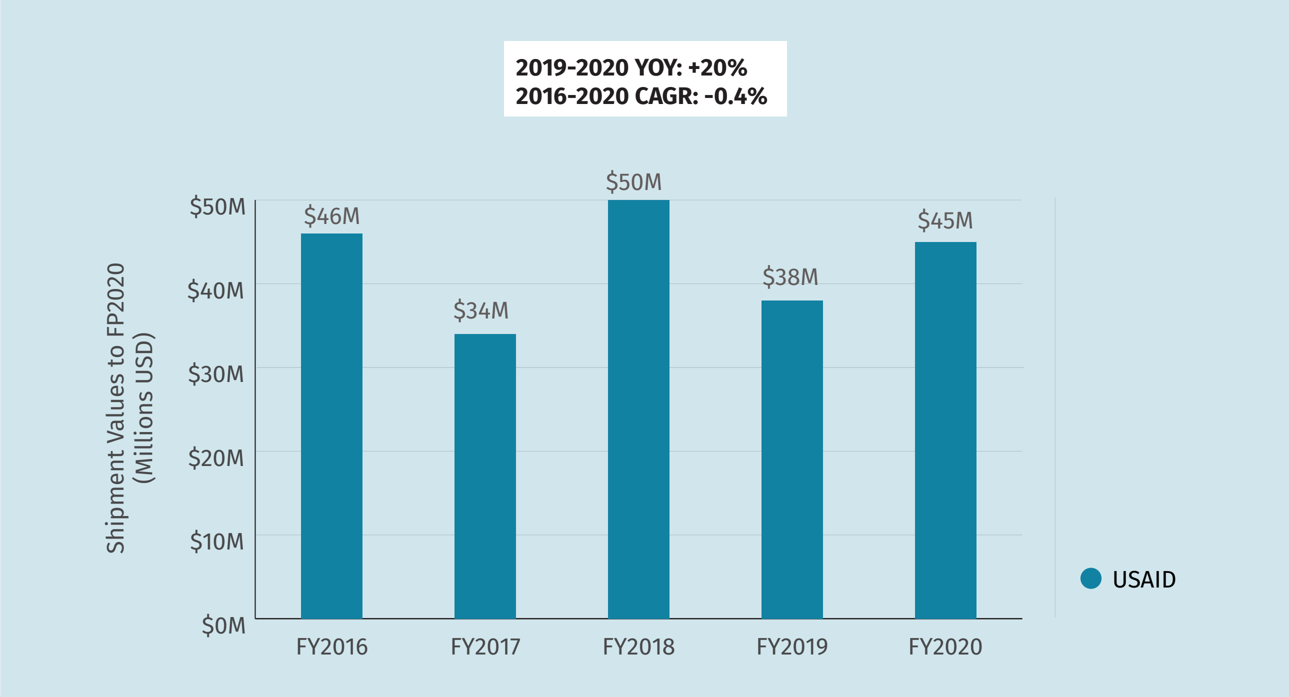


Exhibit 11: USAID procurement value (excluding male and female condoms) – contraceptives to FP2020 countries (in USD)



Sources: [1]UNFPA Procurement Services Branch data FY2016 -FY2020; [2] USAID "Overview of Contraceptive and Condom Shipments" reports, FY 2016 – FY2020.

DONOR SPEND ON CONTRACEPTIVE PROCUREMENT INCREASED TO A FIVE-YEAR HIGH IN FY2020. HOWEVER, THE LONG-TERM TRAJECTORY OF DONOR SPEND ON CONTRACEPTION IS UNCERTAIN.

Although UNFPA's FY2020 spend on contraceptives reached its highest level over the FY2016-FY2020 period, there is heightened uncertainty regarding longer-term donor funding. For example, in 2019, the UK government committed £600 million in funding to the sexual and reproductive health space, including procurement funding for family planning supplies[14] for the 2020-2025 period. For 2021, however, the UK government announced significant cuts in its funding for Official Development Assistance (ODA) due to the impact of the COVID-19 global pandemic on the economy and public finances[15], which has included an approximate 85 percent / $180 million cut in its funding to UNFPA Supplies.[16] In order to mitigate this shortfall, other donors have been actively working to increase their own commitments to the UNFPA Suppliers Partnership. For example, France announced a multi-year €90 million contribution to the UNFPA Supplies Partnership[17], and the United States re-engaged with UNFPA to restore core funding in 2021.[18]

USAID spend on contraceptive procurement has been less than that of UNFPA, but has been stable from FY2016-FY2020.[19] Missions will continue to determine the level of contraceptive procurement spend in individual countries. As per USAID's "Journey to Self-Reliance" strategy, efforts will continue to strengthen local capacity and work towards domestic self-financing.[20]

Looking forward, the funding requirement for contraceptive procurement is likely to continue to increase. Estimates from the Guttmacher Institute in 2019 suggest that approximately 218 million women of reproductive age in low-and middle-income countries had an unmet need for contraception.[21] In addition to current needs, RHSC's LEAP (Landscape & Projection of Reproductive Health Supply Needs) analysis suggests that the total number of contraceptive users in low- and middle-income countries will increase by 75 million users by 2030.[22] Therefore, the demand for safe, quality-assured, affordable contraception seems likely to continue to grow and outpace the availability of government and donor funding.

While the procurement data in this year's report demonstrates that the public-sector market value in the FP2020 countries increased in 2020, there remain significant unmet needs for modern contraceptive methods in FP2020 countries. These unmet needs may be exacerbated by the uncertainty of future SRH and contraceptive procurement funding. Today, many countries' supply plans remain partially unfunded due to a lack of donor or domestic financing, a situation which may only be worsened as COVID-19 continues to put pressure and place demands on country and donor resources. Thus, to meet the growing demand from users in FP2020 countries for safe, effective, and quality-assured contraceptive products, donor and/or domestic funding will need to increase, along with the continued pursuit of product affordability and accessibility.

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.gov.uk/government/speeches/official-development-assistance-foreign-secretarys-statement-november-2020**

16 **https://www.unfpa.org/press/statement-uk-government-funding-cuts**

17 **https://www.unfpa.org/press/support-france-safeguard-health-and-lives-millions-women-and-girls?page=27**

18 **https://www.state.gov/u-s-engagement-with-the-un-population-fund-unfpa/**

19 President Biden released his FY2022 budget request to Congress on May 28, 2021. Bilateral FP/RH funding included in this request totaled $584 million, which constitutes a 2 percent increase above the FY21 funding level. Proposed funding for UNFPA increased to $56M over the $32.5 million allotted in FY21. On June 28, 2021, the House Committee on Appropriations released its FY2022 State, Foreign Operations, and Related Programs (SFOPs) appropriations bill, proposing funding increases above the Administration's budget request. The bilateral FP/RH funding included in this bill totaled $760 million, with a total of $70 million in funding allocated for UNFPA. On October 18, 2021, the Senate Appropriations Committee released its version of the FY2022 SFOPs appropriations bill, proposing $650 million in bilateral FP/RH funding and $55 million in funding for UNFPA. At the time of writing, budget conversations were ongoing. Information available at: **https://www.kff.org/news-summary/white-house-releases-full-fy-2022-budget-request/** and **https://www.kff.org/news-summary/house-appropriations-committee-releases-the-fy22-state-and-foreign-operations-sfops-appropriations-bill/** and **https://www.kff.org/news-summary/senate-appropriations-committee-releases-fy-2022-state-and-foreign-operations-sfops-and-labor-health-and-human-services-labor-hhs-appropriations-bills/**.

20 See footnote 13 for more information on USAID's "Journey to Self-Reliance."

21 In RHSC's 2021 LEAP analysis, RHSC shifted from providing a spending and gap analysis (typically included in RHSC's Contraceptive Gap Analysis report) to instead focusing on how supply costs will change going forward. Accordingly, the Family Planning Market Report now incorporates funding gap analysis information from the Guttmacher Institute: For more information, see The Guttmacher Institute's report "Adding It Up: Investing in Sexual and Reproductive Health 2019", published in 2020. Available at: **https://www.guttmacher.org/report/adding-it-up-investing-in-sexual-reproductive-health-2019#**.

22 RHSC Landscape & Projection of Reproductive Health Supply Needs, 2021. Available at: **https://leap.rhsupplies.org/#/contraception**.

HIGHLIGHTS FROM DISCUSSION WITH KEY STAKEHOLDERS

A NUMBER OF SUPPLIERS, DONORS, AND OTHER SRH PARTNERS WERE CONSULTED TO DISCUSS THE TRENDS OBSERVED IN THIS REPORT.

In discussing the 2020 public-sector market trends, stakeholders expressed an appreciation for the SRH community's resilience, and its efforts to prevent large-scale procurement disruptions from taking place throughout 2020, especially in light of the COVID-19 pandemic. Although some manufacturing disruptions were notable at the beginning of the COVID-19 pandemic, a joint JSI/RHSC analysis of SRH supply chains indicates these disruptions were sufficiently resolved to resume procurement processes within "weeks, rather than months."[23] This analysis is consistent with stakeholder feedback. Additionally, stakeholders indicated that COVID-19 disruptions were more pronounced during COVID-19's first wave, when suppliers and partners first grappled with the challenges of operating during a pandemic. During this first wave, stakeholders throughout the SRH community worked with governments and missions to advocate for policies that would help contraceptive manufacturers navigate lockdowns in affected regions and minimize manufacturing disruptions. Manufacturers also adapted to the changing environment, adopting new procedures and risk mitigation strategies to ensure production could continue throughout the subsequent waves of the pandemic.[24]

That being said, 2020 did still present certain challenges in terms of contraceptive procurement. For example, in this report, market value is calculated by multiplying supplier shipment volumes against publicly available commodity prices (published in the 2020 UNFPA Contraceptive Price Indicator). Shipping and freight costs are not included in the UNFPA Contraceptive Price Indicator. Stakeholders indicated that shipping costs increased due to COVID-19, and that delivery delays and lead times also increased throughout 2020. Accordingly, stakeholders signaled that public-sector contraceptive procurement for the FP2020 countries may have increased even further in 2020, had greater resources not been required to counter higher shipping and freight costs due to the COVID-19 pandemic.

Finally, while the Family Planning Market Report provides a useful overview of contraceptive procurement,[25] it does not necessarily show the impact of COVID-19 on contraceptive distribution and uptake in countries. While the market value in terms of contraceptive procurement increased from 2019 to 2020, this report cannot infer how family planning consumption or uptake in countries evolved from 2019 to 2020, since consumption is impacted by a range of factors beyond the scope of this report, such as distribution and supply chain logistics, and the ability of end users to access health services. Therefore, the procurement data from the Family Planning Market Report should not be confounded with demand or delivery data.

Finally, stakeholders uniformly expressed uncertainty about the funding environment for contraceptive procurement in the coming years. Stakeholders indicated that the SRH community had been able to weather the COVID-19 pandemic in 2020, in part due to previous funding commitments made in 2019. The SRH community entered 2020 with substantial funding already committed to product orders; however, the announcement of notable cuts to SRH commodity funding in early 2021 has generated a heightened level of uncertainty with regards to procurement funding. Should the global economic context remain challenging (e.g., due to the continued and residual effects of COVID-19), stakeholders expressed concern about the ability to sustain and/or grow contraceptive procurement, prevent future stockouts, and ensure the continuity of services for end users. Although the public-sector FP2020 market for contraceptive procurement remained resilient throughout 2020, stakeholders highlighted the need for heightened resilience, increased collaboration, and forward-looking approaches to ensure that women and girls can continue to access safe, effective, and quality-assured contraceptive products.

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23 JSI/RHSC, "Building Resilient Sexual and Reproductive Health Supply Chains During COVID-19 and Beyond", 2021. Link available at: **https://publications.jsi.com/JSIInternet/Inc/Common/_download_pub.cfm?id=24430&lid=3**

24 Ibid

25 As stated in the 2016 RHSC Commodity Gap Analysis, 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." Link available at (following page): **https://www.rhsupplies.org/uploads/tx_rhscpublications/Global_Contraceptive_Commodity_Gap_Analysis_2016.pdf**

GLOBAL MARKETS VISIBILITY PROJECT ACKNOWLEDGEMENTS

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 users in the 69 FP2020 focus countries to access family planning products and services.

This report is a collaboration between CHAI and the Reproductive Health Supplies Coalition (RHSC). The initial 2015 report was comprised of data from 11 manufacturers. Each manufacturer entered into a formal MOU with CHAI or provided their information through collaborations with the then Generic Manufacturers Caucus for Reproductive Health (GEMs) and i+solutions. Since then, coverage has expanded, and today there are 17 suppliers participating in the project.

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 made to collect as much data as possible, it should be noted that the data in this report may not represent the entirety of contraceptive procurement for the FP2020 public sector. This report includes data from most, but not all, suppliers associated with these markets.

About the Participating Suppliers

(in alphabetical order)

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 IUD, combined oral contraceptives, and injectables.

Corporate Channels

Corporate Channels India Pvt. Ltd. (CCIPL) is a manufacturer of female contraceptive devices based in India, since 1993. CCIPL's contraceptive product portfolio includes several IUDs (EVE'S Copper T380A, TCu380A Ultra Loadezy, PPIUD, Cu 375, and Cu375SL) that provide long acting reversable contraception, and Tubal Rings[26] that provide permanent contraception for women.

CCIPL's Copper T 380A IUD has been prequalified by WHO/UNFPA for global supply, and several products (EVE'S Copper T380A, EVE'S Cu 375 and EVE'S Cu 375 SL) have been CE marked.

Cipla

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

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.

Cupid

Cupid Limited is a manufacturer of both male and female condoms based in India. Its services include contract manufacturing (e.g., Playboy condoms, Trust condoms) and research and development, as well as the marketing and manufacturing of its own branded products.

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.

26 The procurement of products used for sterilization such as tubal rings are not covered in this report.

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 2015, 2016, and 2017 Family Planning 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 2018, 2019, 2020 and 2021 Family Planning Market 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 RH Viz database.

Incepta

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 77 countries around the world. Its contraceptive product portfolio includes oral (combined and progestin only) and injectable contraceptives.

Medicines360

Medicines360 is a U.S.-based, nonprofit global women's health pharmaceutical company that seeks to catalyze equitable access to medicines and devices through product development, policy advocacy, and collaboration with global and U.S. partners. Medicines360's portfolio consists of a hormonal IUD marketed as Avibela in LMICs and Liletta in the U.S.

Merck (MSD)

Merck is a U.S.-based healthcare company which operates as MSD outside of the USA and Canada. Its contraceptive product portfolio includes contraceptive implants (Implanon NXT, which includes a prefilled sterile applicator), oral contraceptives (Exluton and Marvelon) for FP2020 public-sector markets, and oral contraceptives (Cerezette, Exluton, Marvelon, Mercilon, and for USA/CAN Zoely), contraceptive implants (Implanon NXT) and the contraceptive vaginal ring (NuvaRing) for non-FP2020 markets.

Pfizer

Pfizer is a U.S.-based healthcare company. Its contraceptive product portfolio includes 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 IUD (Eloira), IUDs, and tubal rings used for female sterilization.

PT Tunggal

PT Tunggal Idaman Abdi (PT Tunggal) is a pharmaceutical company based in Jakarta, Indonesia, with a focus on reproductive healthcare. Its contraceptive product portfolio includes a monthly injectable, a three monthly injectable, a combined oral contraceptive, and an emergency oral contraceptive. Today, PT Tunggal exports to over 60 countries and in August 2021, its three monthly injectable Triclofem received WHO pre-qualified status.

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 served as a supplier to Helm AG previously.

Viatris (Mylan)

Viatris (Mylan) is a U.S. based healthcare company with over 7,500 marketed products. Its contraceptive product portfolio includes oral solids, injectables, and devices.

APPENDICES

APPENDIX A - 69 FP2020 Countries: Market volumes by method[27] and country, 2016–2020

Exhibit A.1: 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	170,000	211,440
Bangladesh	–	150,000	8,200,000	–	–
Benin	3,708,000	277,028	70,000	42,000	5,040
Bhutan	–	–	237,000	–	–
Bolivia	50,400	67,800	3,000	–	5,760
Burkina Faso	12,911,000	427,800	1,123,500	–	1,600,971
Burundi	14,555,999	1,600	–	–	70,240
Cambodia	5,719,248	58,960	1,000,000	30,000	10,539,359
Cameroon	18,205,048	82,488	482,975	11,000	500,000
Central African Republic	3,628,800	6,200	147,600	500	262,296
Chad	–	41,024	15,600	–	–
Comoros	1,442,448	1,972	113,000	–	77,040
Congo Dem Rep	12,403,997	688,089	–	48,345	1,026,756
Congo Rep	3,600,000	1,008	6,720	40,805	2,880
Cote d'Ivoire	16,569,000	97,256	3,023,395	10,000	997,500
Djibouti	–	–	663,000	10,500	44,280
Egypt Arab Rep	–	140,000	–	2,680,434	–
Eritrea	–	–	100,000	–	126,640
Ethiopia	46,914,000	1,022,105	7,570,056	751,144	6,625,921
Gambia	2,880,000	20,016	313,000	1,500	565,200
Ghana	32,898,960	141,432	3,889,100	15,410	2,751,660
Guinea	12,488,000	77,000	90,000	–	512,644
Guinea-Bissau	–	50,000	13,000	10,000	10,080
Haiti	35,850,000	5,300	–	1,500	30,240
Honduras	25,005,600	–	1,977,000	26,000	1,385,280
India	5,000	–	23,984	865,062	6,137,520
Indonesia	5,000	350,000	–	120,074	–
Iraq	–	1,000	–	–	–
Kenya	54,090,024	742,864	95,000	37,500	3,403,080
Korea Dem Rep	–	–	905,200	–	–
Kyrgyz Republic	2,440,080	–	–	–	–
Lao PDR	–	53,200	850,600	29,000	1,405,440
Lesotho	15,762,000	23,452	260,400	1,000	218,160

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

Exhibit A.1: 69 FP2020 Countries: Contraceptive market volumes by method, 2016					
Country	**Condoms - Male & Female**	**Implants**	**Injectables**	**IUDs**	**Orals**
Liberia	16,463,280	44,600	–	–	251,040
Madagascar	4,500,000	303,932	1,440,600	43,000	849,600
Malawi	30,371,800	33,700	2,475,200	–	–
Mali	15,445,704	27,072	25,000	20,000	20,160
Mauritania	3,110,400	2,500	39,000	–	164,160
Mongolia	8,812,800	3,100	30,000	22,000	405,108
Mozambique	59,034,000	–	90,000	13,000	205,920
Myanmar	14,873,472	147,348	1,800	25,000	7,560,366
Nepal	32,161,800	98,400	25,400	31,950	228,066
Nicaragua	–	4,008	–	15,000	–
Niger	–	50,400	1,317,700	–	3,141,960
Nigeria	141,736,200	771,763	1,278,600	90,030	3,320,703
Pakistan	108,752,496	800	–	2,386,371	15,120
Papua New Guinea	1,994,400	103,000	22,600	3,700	11,520
Philippines	–	–	–	1,070,737	–
Rwanda	21,038,900	65,294	1,734,900	3,100	2,439,900
Sao Tome and Principe	–	–	–	–	63,360
Senegal	11,202,000	179,864	10,000	32,675	860,949
Sierra Leone	1,080,000	73,000	280,200	5,500	955,860
Solomon Islands	–	–	–	–	–
Somalia	–	–	1,950	–	19,000
South Sudan	9,681,120	30,000	150,000	–	172,080
Sri Lanka	–	50,500	650,000	100,000	6,049,600
Sudan	7,216,992	49,104	29,800	6,500	338,345
Tajikistan	19,774,248	–	93,000	98,000	415,440
Tanzania	428,800	986,112	4,741,200	486,000	5,621,360
Timor-Leste	–	10,500	–	2,500	–
Togo	14,036,128	46,656	315,800	–	27,360
Uganda	19,200,000	234,524	1,184,250	45,200	5,740,520
Uzbekistan	6,228,720	–	848,400	432,800	–
Vietnam	–	–	–	1,096,080	–
West Bank and Gaza	–	–	800	–	–
Western Sahara	–	–	–	–	–
Yemen Rep	6,302,880	–	157,000	75,000	1,141,120
Zambia	32,762,600	142,000	443,000	–	–
Zimbabwe	104,973,952	140,656	661,800	1,800	19,521,550
Other FP2020 Shipment Volumes	25,573,000	1,016,700	392,800	207,850	21,702,220
Total Volumes	**1,038,899,176**	**9,157,327**	**49,632,930**	**11,215,567**	**119,757,814**

Sources: [1] USAID Worldwide Contraceptive and Condom Shipments FY 2016 – 2020; [2] UNFPA PSB Procurement Values 2016 -2020

Exhibit A.2: 69 FP2020 Countries: Contraceptive market volumes by method, 2017					
Country	Condoms - Male & Female	Implants	Injectables	IUDs	Orals
Afghanistan	16,665,410	9,800	59,600	100,000	365,200
Bangladesh	1,195,200	400,000	7,258,000	–	–
Benin	368,399	34,900	30,600	–	–
Bhutan	–	–	–	–	–
Bolivia	2,001,600	94,600	50,400	–	30,000
Burkina Faso	15,050,020	95,300	481,200	–	3,741,150
Burundi	–	–	17,500	–	169,980
Cambodia	1,929,600	40,056	900,000	60,000	7,082,236
Cameroon	6,658,400	95,200	327,000	33,500	298,080
Central African Republic	268,999	–	–	–	95,040
Chad	–	–	–	–	–
Comoros	1,267,200	2,520	40,000	150	60,480
Congo Dem Rep	840,000	364,828	2,143,580	–	1,380,220
Congo Rep	2,160,000	76,076	32,000	500	720
Cote d'Ivoire	11,992,968	196,600	243,000	–	6,521,413
Djibouti	–	–	–	–	6,480
Egypt Arab Rep	–	40,032	–	375,045	–
Eritrea	8,640,000	12,500	100,000	–	112,560
Ethiopia	57,600,000	1,107,134	7,436,988	440,000	10,794,948
Gambia	5,371,200	16,488	110,000	1,500	235,440
Ghana	–	250,256	106,000	11,500	3,183,960
Guinea	158,136	100,000	–	–	30,240
Guinea-Bissau	6,972,620	27,300	2,500	–	2,160
Haiti	69,455,900	4,116	863,400	–	647,304
Honduras	3,024,000	1,440	21,000	6,000	1,641,840
India	–	–	1,047,488	522,885	2,262,311
Indonesia	–	–	–	–	–
Iraq	316,944	–	–	–	40,032
Kenya	229,000	408,781	437,376	126,000	7,921,836
Korea Dem Rep	–	–	–	–	–
Kyrgyz Republic	–	–	–	–	–
Lao PDR	1,929,000	65,808	76,800	–	701,040
Lesotho	14,001,000	31,200	165,000	–	176,400
Liberia	2,853,000	36,100	319,000	–	5,760
Madagascar	–	256,618	3,012,800	295,019	1,288,800
Malawi	21,759,000	167,408	1,000,000	36,500	236,700
Mali	17,255,400	209,728	293,000	26,000	210,240

Exhibit A.2: 69 FP2020 Countries: Contraceptive market volumes by method, 2017

Country	Condoms - Male & Female	Implants	Injectables	IUDs	Orals
Mauritania	–	10,404	88,600	1,500	295,920
Mongolia	8,488,800	800	–	53,000	350,160
Mozambique	56,748,000	60,016	1,373,600	23,600	3,278,160
Myanmar	35,136,646	18,936	6,108,125	200	14,780,928
Nepal	16,701,000	211,800	641,000	74,000	4,015,160
Nicaragua	2,911,680	504	–	–	50,000
Niger	979,200	54,100	499,000	7,920	437,040
Nigeria	44,137,000	665,160	3,316,700	–	1,229,445
Pakistan	512,480	900	–	495,960	123,840
Papua New Guinea	669,600	30,000	22,000	4,000	82,720
Philippines	–	–	–	–	–
Rwanda	1,631,200	84,062	8,200	13,200	68,400
Sao Tome and Principe	1,108,800	300	28,000	–	98,100
Senegal	–	67,864	160,000	–	139,140
Sierra Leone	19,728,000	230,400	332,650	16,000	1,087,240
Solomon Islands	–	–	–	–	–
Somalia	–	2,500	3,500	–	–
South Sudan	11,340,000	25,016	150,000	–	20,000
Sri Lanka	4,056,620	65,500	–	50,000	3,589,760
Sudan	–	36,936	–	6,000	2,123,400
Tajikistan	4,687,200	–	142,000	–	613,440
Tanzania	4,320,180	798,920	2,830,850	177,000	2,885,763
Timor-Leste	1,080,000	20,000	–	–	–
Togo	8,466,200	67,388	140,000	5,000	25,002
Uganda	–	297,652	3,895,400	251,000	249,520
Uzbekistan	13,217,540	–	–	–	718,989
Vietnam	21,816,000	12,636	1,196,500	1,239,531	–
West Bank and Gaza	1,944,000	–	–	–	–
Western Sahara	–	–	–	–	–
Yemen Rep	8,760,960	64,288	445,000	–	–
Zambia	16,389,600	161,800	3,418,650	–	3,528,960
Zimbabwe	64,653,000	60,496	1,399,200	10,000	12,716,941
Other FP2020 Shipment Volumes	5,859,600	1,058,100	5,912,600	286,950	23,003,805
Total Volumes	**625,306,304**	**8,251,267**	**58,685,807**	**4,749,460**	**124,754,403**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021.

Exhibit A.3: 69 FP2020 Countries: Contraceptive market volumes by method, 2018					
Country	**Condoms - Male & Female**	**Implants**	**Injectables**	**IUDs**	**Orals**
Afghanistan	–	16,500	307,750	–	224,480
Bangladesh	12,355,200	793,064	15,194,000	720,000	20,049,680
Benin	12,966,000	38,100	38,000	–	2,250
Bhutan	–	–	–	–	–
Bolivia	–	73,300	200,000	10,000	230,022
Burkina Faso	11,720,400	342,940	246,400	–	3,398,400
Burundi	22,039,200	4,000	126,400	–	415,332
Cambodia	3,427,200	46,392	700,000	30,000	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	738	39,648
Chad	1,008,000	38,846	187,000	–	5,000
Comoros	1,180,800	–	–	–	3,000
Congo Dem Rep	49,969,750	331,170	1,343,100	–	370,560
Congo Rep	–	246,500	–	86,000	12,120
Cote d'Ivoire	25,420,800	139,088	474,800	23,000	3,867,676
Djibouti	396,000	3,200	70,400	–	–
Egypt Arab Rep	–	160,046	–	3,774,650	–
Eritrea	–	2,200	100,000	–	10,025
Ethiopia	35,004,720	1,205,446	7,753,455	600,000	7,896,030
Gambia	–	1,400	160,500	1,000	660,816
Ghana	33,221,400	282,314	2,423,500	30,500	2,827,200
Guinea	9,360,000	–	100,000	–	51,360
Guinea-Bissau	10,310,400	–	6,600	–	42,120
Haiti	85,745,640	34,016	1,827,000	2,000	100,212
Honduras	24,012,000	1,000	107,000	1,100	74,880
India	–	–	102,000	3,221,980	366,065
Indonesia	–	–	–	852,430	–
Iraq	1,000,800	–	–	4,180	–
Kenya	2,000,000	379,232	470,124	101,225	12,791,937
Korea Dem Rep	–	–	–	–	–
Kyrgyz Republic	1,432,800	–	–	220,800	–
Lao PDR	600,000	–	242,000	12,500	660,600
Lesotho	8,192,600	7,644	15,000	10,000	116,682
Liberia	1,180,800	37,500	705,200	–	32,400
Madagascar	5,001,000	325,344	4,866,200	–	204,800
Malawi	166,785,600	173,874	4,947,825	–	1,250,484
Mali	13,067,620	56,576	1,578,800	8,757	1,063,635
Mauritania	–	5,700	86,800	–	711,360

Exhibit A.3: 69 FP2020 Countries: Contraceptive market volumes by method, 2018					
Country	Condoms - Male & Female	Implants	Injectables	IUDs	Orals
Mongolia	5,508,000	6,200	–	28,000	420,000
Mozambique	86,133,400	231,648	3,291,800	97,816	643,680
Myanmar	49,103,686	103,540	2,889,125	54,200	11,190,719
Nepal	13,197,480	176,000	2,170,400	60,000	3,299,530
Nicaragua	11,164,300	2,854	–	12,000	–
Niger	849,600	170,940	914,200	–	658,002
Nigeria	42,934,272	1,023,764	4,731,600	150,800	1,996,764
Pakistan	758,016	10,000	100,000	486,525	–
Papua New Guinea	6,112,800	60,000	5,000	9,964	424,967
Philippines	2,397,600	–	–	50,450	–
Rwanda	31,860,800	256,072	862,200	11,000	55,680
Sao Tome and Principe	1,112,832	500	26,000	–	67,080
Senegal	16,566,000	186,336	–	7,000	–
Sierra Leone	–	153,533	972,800	25,500	435,480
Solomon Islands	–	–	–	–	–
Somalia	72,000	15,240	100,000	–	–
South Sudan	2,476,000	54,000	340,000	–	610,080
Sri Lanka	–	500	–	50,000	2,119,680
Sudan	720,000	51,264	–	4,000	–
Tajikistan	–	–	138,000	100,500	595,224
Tanzania	2,868,000	810,780	2,067,300	23,600	1,273,980
Timor-Leste	–	3,900	–	–	–
Togo	21,247,832	75,264	118,400	–	164,154
Uganda	124,701,400	811,576	5,469,525	248,500	4,369,950
Uzbekistan	–	–	–	–	–
Vietnam	21,816,000	–	–	925,250	–
West Bank and Gaza	–	–	–	5,000	–
Western Sahara	–	–	–	–	–
Yemen Rep	1,303,200	37,440	1,093,600	51,700	30,000
Zambia	93,849,400	115,096	1,855,950	–	6,965,040
Zimbabwe	66,442,460	87,500	1,010,975	25,000	18,265,635
Other FP2020 Shipment Volumes	4,179,920	1,263,200	7,977,325	123,680	10,256,278
Total Volumes	**1,167,367,328**	**10,570,291**	**80,960,254**	**12,264,845**	**133,406,993**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021.

Exhibit A.4: 69 FP2020 Countries: Contraceptive market volumes by method, 2019					
Country	Condoms - Male & Female	Implants	Injectables	IUDs	Orals
Afghanistan	4,002,000	7,800	617,000	175,800	1,228,896
Bangladesh	1,224,000	265,253	4,383,060	300,000	16,506,300
Benin	103,000	214,400	125,600	52,000	–
Bhutan	1,584,000	–	–	–	–
Bolivia	10,000	78,500	60,000	–	12,240
Burkina Faso	7,301,000	416,984	1,161,500	41,000	4,800
Burundi	–	130,000	1,080,000	26,050	343,160
Cambodia	6,724,800	55,780	750,000	50,000	11,455,614
Cameroon	24,774,470	29,780	40,000	41,100	80,640
Central African Republic	–	738	94,900	13,000	1,615,008
Chad	1,008,000	153,366	379,800	20,000	226,080
Comoros	1,180,800	–	–	500	–
Congo Dem Rep	46,256,800	576,760	3,128,810	211,384	2,297,938
Congo Rep	–	148,904	19,800	191,405	9,540
Cote d'Ivoire	25,732,600	180,376	692,050	33,000	2,906,090
Djibouti	288,000	–	–	–	218,160
Egypt Arab Rep	11,224,800	333,164	–	490,200	–
Eritrea	–	17,300	100,000	–	10,800
Ethiopia	11,628,720	1,558,934	8,006,045	55,863	9,009,906
Gambia	2,548,800	69,984	140,000	–	105,840
Ghana	–	390,383	1,596,700	31,653	4,097,860
Guinea	49,433,000	–	666,600	38,000	287,440
Guinea-Bissau	7,557,900	–	22,500	3,000	221,436
Haiti	68,804,640	10,000	2,691,800	–	670,896
Honduras	10,728,000	144	45,000	–	1,200,000
India	–	–	–	814,796	38,100
Indonesia	5,000	–	–	1,093,300	–
Iraq	–	–	–	–	308,880
Kenya	38,478,000	366,320	80,000	448,930	3,613,720
Korea Dem Rep	288,000	–	–	–	74,880
Kyrgyz Republic	198,000	–	–	–	–
Lao PDR	1,490,400	–	256,000	–	2,857,608
Lesotho	1,728,000	2,016	140,600	–	117,900
Liberia	13,440,000	9,800	75,000	12,500	–
Madagascar	–	278,616	5,184,400	87,500	1,599,120
Malawi	139,529,000	670,252	6,569,700	–	2,571,300
Mali	25,216,560	293,636	256,200	29,000	682,560
Mauritania	5,000	18,580	46,200	–	813,960

Exhibit A.4: 69 FP2020 Countries: Contraceptive market volumes by method, 2019					
Country	**Condoms - Male & Female**	**Implants**	**Injectables**	**IUDs**	**Orals**
Mongolia	180,000	13,800	103,260	103,000	285,600
Mozambique	69,433,000	193,108	4,086,200	31,150	4,518,240
Myanmar	26,785,000	80,100	1,425,000	30,000	13,928,915
Nepal	13,999,870	224,200	349,800	–	2,407,144
Nicaragua	–	5,484	–	–	–
Niger	444,000	116,248	100,000	–	1,416,762
Nigeria	60,693,400	1,217,772	3,450,800	325,000	1,200,240
Pakistan	3,749,600	242,600	204,400	1,226,500	40,320
Papua New Guinea	2,997,800	145,000	572,400	–	479,643
Philippines	2,390,400	200,000	–	–	29,808
Rwanda	15,346,000	213,185	441,000	27,000	956,160
Sao Tome and Principe	1,260,376	800	19,000	–	100,080
Senegal	12,218,000	142,056	466,000	72,000	986,580
Sierra Leone	5,589,400	274,900	276,000	57,500	468,720
Solomon Islands	–	–	–	–	–
Somalia	28,800	–	45,000	–	810,000
South Sudan	50,000	–	350,000	–	1,004,400
Sri Lanka	4,913	100,508	–	–	2,119,680
Sudan	–	26,800	146,400	–	6,472,122
Tajikistan	9,572,398	–	166,000	–	717,768
Tanzania	30,880,356	421,154	3,895,300	174,590	4,488,591
Timor-Leste	725,760	10,000	220,000	–	340,704
Togo	26,079,160	79,600	274,400	–	600,192
Uganda	147,135,800	414,360	3,655,140	161,500	436,968
Uzbekistan	6,652,800	–	570,000	1,730,000	760,002
Vietnam	–	11,000	490,900	476,950	–
West Bank and Gaza	1,761,120	–	–	–	–
Western Sahara	–	–	–	–	–
Yemen Rep	1,449,600	97,708	498,600	128,100	12,694,226
Zambia	60,015,740	81,456	2,884,600	14,000	2,615,574
Zimbabwe	140,329,440	186,600	758,000	48,500	16,751,896
Other FP2020 Shipment Volumes	4,840,160	456,500	6,216,400	320,610	14,807,358
Total Volumes	**1,147,106,183**	**11,232,709**	**70,073,865**	**9,186,381**	**156,624,365**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021.

Exhibit A.5: 69 FP2020 Countries: Contraceptive market volumes by method, 2020

Country	Condoms - Male & Female	Implants	Injectables	IUDs	Orals
Afghanistan	8,783,160	2,000	42,200	280,974	204,954
Bangladesh	943,200	20,000	14,867,040	2,500	82,546,360
Benin	15,000	10,000	762,000	20,000	441,504
Bhutan	–	–	–	–	–
Bolivia	11,000	36,000	50,000	9,500	14,400
Burkina Faso	15,975,300	236,448	3,041,050	98,400	1,565,376
Burundi	18,439,200	193,100	1,176,000	–	336,492
Cambodia	124,272	43,160	400,000	–	4,406,662
Cameroon	15,854,400	123,340	1,034,400	4,500	603,900
Central African Republic	6,480,000	77,700	214,600	–	171,360
Chad	9,273,800	2,200	560,000	–	342,120
Comoros	–	500	–	–	–
Congo Dem Rep	77,059,680	1,198,628	966,200	122,000	3,090,000
Congo Rep	–	625	21,300	148,600	12,600
Cote d'Ivoire	8,595,000	198,000	987,000	28,500	4,758,577
Djibouti	250,880	200	–	–	39,600
Egypt Arab Rep	1,000	53,000	1,387,600	180,030	–
Eritrea	–	2,000	4,000	–	162,000
Ethiopia	1,968,240	1,290,093	5,458,646	16,600	2,200,276
Gambia	–	29,000	193,300	–	150,192
Ghana	11,930,400	316,176	2,059,300	98,850	5,960,232
Guinea	11,091,000	136,800	59,200	–	51,300
Guinea-Bissau	3,024,000	53,400	232,600	–	800,460
Haiti	21,600,000	13,000	–	–	–
Honduras	16,999,200	49,456	690,900	–	–
India	360	–	–	107,884	24,960
Indonesia	–	–	–	1,047,270	–
Iraq	37,000	–	–	–	–
Kenya	23,732,800	1,527,332	1,360,048	400,750	3,319,772
Korea Dem Rep	–	–	–	–	–
Kyrgyz Republic	–	–	–	–	–
Lao PDR	–	–	526,000	–	1,600,488
Lesotho	4,378,600	2,900	129,800	1,500	660,780
Liberia	15,774,000	88,200	363,000	–	780,120
Madagascar	11,334,760	473,564	3,635,300	216,000	5,438,960
Malawi	59,106,600	386,442	4,810,000	11,400	1,400,232
Mali	2,954,200	302,288	937,300	31,000	30,960
Mauritania	–	3,300	175,600	–	385,344

Exhibit A.5: 69 FP2020 Countries: Contraceptive market volumes by method, 2020					
Country	**Condoms - Male & Female**	**Implants**	**Injectables**	**IUDs**	**Orals**
Mongolia	280,800	11,900	75,000	14,400	495,000
Mozambique	106,529,230	133,700	1,136,900	–	2,654,220
Myanmar	17,952,400	87,232	3,463,620	3,500	9,340,812
Nepal	11,695,970	72,500	10,000	–	365,220
Nicaragua	705,600	6,600	–	6,000	–
Niger	17,894,740	96,656	389,860	51,300	4,400,010
Nigeria	76,046,500	1,491,608	4,234,600	722,299	2,939,913
Pakistan	30,096,000	95,200	–	192,112	443,520
Papua New Guinea	4,266,600	31,000	–	–	–
Philippines	–	403,364	–	30,725	–
Rwanda	31,076,000	47,928	58,200	8,000	1,224,009
Sao Tome and Principe	–	200	17,400	–	2,700
Senegal	9,345,000	125,000	1,007,072	28,760	1,157,409
Sierra Leone	2,904,688	521,100	1,515,000	29,000	1,741,998
Solomon Islands	10,000	–	–	–	–
Somalia	–	–	8,400	–	95,901
South Sudan	8,640,000	–	250,000	2,500	1,531,920
Sri Lanka	–	40,064	30,000	50,000	2,119,680
Sudan	4,320,000	59,944	2,500	6,000	4,651,020
Tajikistan	5,889,600	–	–	160,000	496,944
Tanzania	19,067,140	801,040	2,475,000	192,399	6,231,664
Timor-Leste	4,068,000	19,000	118,000	–	126,000
Togo	20,843,800	15,540	316,400	46,000	–
Uganda	84,725,600	868,680	2,341,900	138,000	1,789,120
Uzbekistan	6,854,400	–	279,400	830,000	–
Vietnam	3,888,000	18,000	146,440	169,350	–
West Bank and Gaza	3,335,042	–	–	–	130,320
Western Sahara	–	–	–	–	–
Yemen Rep	504,000	67,900	70,000	200,000	4,677,940
Zambia	99,441,200	406,532	3,228,400	118,800	5,095,576
Zimbabwe	57,873,000	264,444	2,555,400	69,000	13,756,208
Other FP2020 Shipment Volumes	1,800,000	1,112,700	14,319,600	179,860	22,124,505
Total Volumes	**975,790,362**	**13,666,684**	**84,193,476**	**6,074,263**	**209,091,590**

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021.

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 former RHSC Generic Manufacturers for Reproductive Health Caucus (GEMs). For the subsequent reports, CHAI has collected shipment data directly from the former 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 17 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)

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 FY2016 through FY2020 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 2016 to 2020 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 Supplies Visualized (RH Viz)[28]

The RH Viz database provides visibility into contraceptive shipment volumes via a series of public-facing dashboards. RH Viz leverages both historical procurement shipment data (from 2008-2016), as well as live procurer shipment data from the Global FP VAN (from 2017 forward). Data provided from the Global FP VAN (in RH Viz) currently reflects shipments from and reported by USAID and UNFPA. RH Viz is used as a comparison point for the supplier dataset for a high-level understanding of supplier shipment data coverage, as well as for male condom data.

28 Previous versions of this report utilized the publicly-available Reproductive Health Interchange (RHI) dataset. On September 21, 2020, the RHI interface was replaced by RH Viz; accordingly, this report has transitioned to using the RH Viz database.

APPENDIX C – ESTIMATING THE VALUE OF THE 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 RH Viz shipment data. Shipment data is recorded in the following units:

Exhibit C.1: 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

Historical Supplier-Reported Data

To date, the Global Markets Visibility Project has collected historical supplier-reported shipment data from 17 manufacturers – Bayer, Cipla, Corporate Channels, CR Zizhu, Cupid, Female Health Company, Helm AG, Incepta, Medicines360, Merck (MSD), Pfizer, Pregna, PT Tunggal, Shanghai Dahua, SMB, Techno Drugs and Viatris (Mylan). Collectively, the total volumes cover institutional sales (USAID, UNFPA, SMOs, etc.) and MOH tenders across five family planning product categories.[29]

SUPPLIERS HAVE CUMULATIVELY SHIPPED 94 MILLION FEMALE CONDOMS, 53 MILLION IMPLANTS, 344 MILLION INJECTABLES, 43 MILLION IUDS, 711 MILLION ORALS (COMBINED & PROGESTIN ONLY), AND 33 MILLION EMERGENCY CONTRACEPTIVES FROM 2016 TO 2020.

It is important to note that there were several shipments to procurer (USAID, UNFPA, SMO) 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 on to the 69 FP2020 countries. As a result, these non-FP2020 country volumes were included in the total shipments to the 69 FP2020 countries after it was confirmed with suppliers that the specific non-FP2020 country volumes were associated with institutional purchases.

CHAI analyzed the aggregated historical supplier-reported shipment data to confirm that coverage across the public-sector FP2020 product markets was greater relative to RH Viz shipment data for the 69 FP2020 focus countries. The aim of collecting historical volumes of all institutional purchases and MOH tenders directly from suppliers was to address data gaps observed in publicly available shipment data which only capture a subset of procurers who chose to submit historical procurement data. Furthermore, although some countries report national procurements, many national procurements are not reported in publicly available databases.
The cumulative total from 2016 to 2020 for historical supplier-reported shipment volumes to the 69 FP2020 focus countries and procurer warehouses is greater than RH Viz in every method.

Exhibit C.2: Global Markets Visibility Project participants and products

Manufacturer	Condoms - Female	Implants	Injectables	IUDs	Orals
Bayer		•	•	•	•
Cipla					•
Corporate Channels				•	
CR Zizhu					•
Cupid	•				
Female Health Company	•				
Helm AG	•		•	•	
Incepta			•		•
Medcines360				•	
Merck (MSD)		•			•
Pfizer			•		
Pregna				•	
PT Tunggal			•		•
Shanghai Dahua		•			
SMB				•	
Techno Drugs		•	•		•
Viatris (Mylan)			•	•	•

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

Sources: [1] Historical Supplier-Reported Shipment Data.

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

Exhibit C.3: Supplier-reported shipment volumes to FP2020 countries by method, 2016-2020

Method	2016	2017	2018	2019	2020	Cumulative Total
Condoms - Female	22M	22M	13M	21M	16M	94M
Implants	9M	8M	11M	11M	14M	53M
Injectables	50M	59M	81M	70M	84M	344M
IUDs	11M	5M	12M	9M	6M	43M
Orals - Combined & Progestin Only	114M	118M	127M	151M	201M	711M
Orals - Emergency	6M	6M	6M	6M	8M	33M

Exhibit C.4: Supplier-reported shipment volumes as a percentage of RH Viz-reported volumes by method, 2016-2020

Method	2016	2017	2018	2019	2020	Cumulative Total
Condoms - Female	119%	141%	76%	136%	94%	112%
Implants	153%	169%	116%	140%	144%	141%
Injectables	123%	163%	181%	129%	143%	147%
IUDs	333%	234%	389%	385%	324%	339%
Orals - Combined & Progestin Only	170%	249%	192%	218%	194%	201%
Orals - Emergency	434%	1221%	374%	500%	356%	465%

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2021

Male Condom Market

RH Viz shipment data for male condoms was used to capture a more comprehensive view of the public-sector family planning market for the 69 FP2020 focus countries. The report used RH Viz shipment data from 2016 to 2020 and included all male condom shipment volumes to the 69 FP2020 focus countries as well as volumes associated with procurer warehouses in non-FP2020 focus countries.[30]

The supplier-reported volumes for female condoms, implants, injectables, IUDs, and orals, together with RH Viz shipment volumes for male condoms, represent the estimated FP2020 public-sector market from 2016 to 2020.

Exhibit C.5: RH Viz male condoms shipment volumes, 2016-2020

Method	2016	2017	2018	2019	2020
Condoms – Male	1.02B	0.60B	1.15B	1.13B	0.96B

Sources: [1] RH Viz Shipment Data, retrieved August 2021

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

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[31]. CYP factors calculate the estimated protection provided by different contraceptive methods. Because methods may have different CYPs associated with various 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.6: Volumes to CYPs shipped conversion factors, 2016–2020

Method	Per 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 (copper)	0.22
Orals – Combined	15.00
Orals – Progestin Only	12.00
Orals – Emergency	20.00

Sources: [1] USAID, "Couple-Years of Protection (CYP)," October 2021.

31 USAID refreshed its CYP conversation factors in 2021; these updates have been incorporated into the Family Planning Market Report. USAID, "Couple-Years of Protection (CYP)", available at **https://www.usaid.gov/global-health/health-areas/family-planning/couple-years-protection-cyp**.

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.[32] Finally, the Implant Access Program price of $8.50 was applied to implant volumes from 2016 to 2018. In 2019 and 2020, 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 and 2020. 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.

To maintain consistency across dollar-value comparisons, this average pricing was applied to all market trends across supplier-reported and RH Viz-reported volumes.

Exhibit C.7: Average unit price

Method	Price Range		2016	2017	2018	2019	2020
	Minimum	Maximum	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
Condoms - Female	$0.43	$0.49	$0.49	$0.46	$0.47	$0.44	$0.43
Condoms – Male	$0.02	$0.03	$0.03	$0.02	$0.02	$0.02	$0.02
Implants	$8.26	$8.50	$8.50	$8.50	$8.50	$8.37	$8.26
Injectables	$0.77	$0.82	$0.82	$0.79	$0.81	$0.77	$0.81
IUDs	$0.30	$0.37	$0.30	$0.31	$0.30	$0.31	$0.37
Orals – Combined	$0.23	$0.27	$0.26	$0.27	$0.24	$0.23	$0.23
Orals – Progestin Only	$0.29	$0.33	$0.33	$0.32	$0.29	$0.29	$0.30
Orals - Emergency	$0.26	$0.40	$0.35	$0.26	$0.28	$0.40	$0.26

Notes: [1] For 2016-2018 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, 2016 to 2020; [2] IAP Implant Prices.

32 UNFPA, "UNFPA Contraceptive Price Indicator—Year 2020", available at **https://www.unfpa.org/resources/contraceptive-price-indicator-year-2020**. 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**.

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 and RHSC use 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 and RHSC 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[33]. 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 an initial view into domestic procurement in these markets, that may not be fully covered by the suppliers participating in this report.

Bangladesh

The Bangladesh Ministry of Health and Family Welfare (MOHFW) procured[34] 13 million CYPs for the 2020 calendar year, as compared to 12 million CYPs for the 2019 calendar year, 17 million CYPs for the 2018 calendar year, 3M CYPs for the 2017 calendar year, and 8 million CYPs for the 2016 calendar year. Procurement contracts in 2020 were awarded primarily to regional and local suppliers, including (but not limited to): Essential Drugs Co., Khulna Essential, M/S, Reneta Ltd., Popular Pharmaceuticals Ltd[35]., Sarban International Ltd., and Techno Drugs. By applying the same prices[36] used for 2020 supplier shipment analyses to the volumes from the Bangladesh MOHFW procurement data, the implied value from Bangladesh's procurement contracts is estimated to be $39 million for 2020, as compared to the $31 million implied by the 2020 supplier shipment data.

Although contraceptive procurement 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 9.5 to 13.2 million CYPs—from 2016 to 2020.

This analysis relies on data from the Government of Bangladesh's Ministry of Health and Family Welfare (MOHFW)[37] for 2016, 2017, 2018 2019, and 2020.[38]

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33 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 Family Planning 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.

34 Note the Bangladesh MOHFW records procurement in terms of the date of receipt for shipments, rather than date shipped.

35 In 2017, Incepta supplied the Ministry of Health and Family Welfare (MOHFW) with injectables via Popular Pharmaceuticals Ltd. Source: Incepta Pharmaceuticals.

36 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.

37 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**

38 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 2016-2020.

Exhibit E.1: MOHFW supply chain contraceptive shipment receipt details (publicly-available volumes data)						
Product Name	**Supplier Name**	**2016**	**2017**	**2018**	**2019**	**2020**
CONDOM	Direct Relief	0	0	1,584,000	0	0
CONDOM	ESSENTIAL DRUGS CO. LTD.	68,850,000	0	56,854,800	11,600,800	72,163,600
CONDOM	KHULNA ESSENTIAL LATEX PLANT (KELP)	35,000,000	0	62,158,800	95,894,000	44,388,400
CONDOM	UNFPA	0	1,195,200	10,080,000	0	0
ECP (2 TAB/PACK)	M/S, RENETA LTD.	100,000	0	100,000	100,000	100,000
IMPLANT (2 ROD)	SOCIAL MARKETING COMPANY (SMC)	17,000	0	0	0	0
IMPLANT (2 ROD)	TECHNO DRUGS Ltd	0	0	385,000	429,054	0
IMPLANT (2 ROD)	USAID	0	35,000	0	0	0
IMPLANT (SINGLE ROD)	JAMES INTERNATIONAL	5	2,880	0	0	0
IMPLANT (SINGLE ROD)	Merck Sharp & Dohme B.V(MSD B.V.).	150,000	3,000	0	0	0
IMPLANT (SINGLE ROD)	MSD-NV Organon, Organon (India) Private Ltd.	0	199,980	0	0	0
IMPLANT (SINGLE ROD)	UNFPA	0	0	200,000	5,000	0
INJECTABLES (DMPA-IM)	Popular Pharmaceuticals Ltd.	0	1,000,000	1,000,000	0	0
INJECTABLES (DMPA-IM)	TECHNO DRUGS Ltd	8,100,000	5,000,000	18,250,000	8,230,000	15,250,000
INJECTABLES (DMPA-IM)	UNFPA	0	299,997	0	0	0
INJECTABLES (DMPA-IM)	USAID	0	1,000,000	914,800	0	0
IUD (CT-380A)	IPAS Bangladesh	0	0	9,500	0	0
IUD (CT-380A)	MARIE STOPES CLINIC	0	65,000	56,000	0	0
IUD (CT-380A)	SARBAN INTERNATIONAL LTD.	0	0	0	0	300,000
IUD (CT-380A)	SMB Corporation Of India	0	0	450,000	0	0
IUD (CT-380A)	UNFPA	0	0	200,000	0	0
ORAL CONTRACEPTIVE PILL (SHUKHI)	M/S, RENETA LTD.	54,750,000	0	54,800,125	110,000,001	50,500,000
ORAL CONTRACEPTIVE PILL (SHUKHI)	Popular Pharmaceuticals Ltd.	14,250,000	0	16,700,000	0	12,500,000
ORAL CONTRACEPTIVE PILL (SHUKHI)	TECHNO DRUGS Ltd	0	0	16,700,000	0	38,000,000
ORAL PILL APON	M/S, RENETA LTD.	3,500,000	750,000	4,000,000	1,000,000	3,500,000

Source: Bangladesh MOHFW, Supply Chain Management Portal, 2021.

India

Based on India's Ministry of Health and Family Welfare (MOHFW)[39] Annual Report for the 2020-2021 fiscal year[40], CYPs procured from product-based methods[41] totaled 44 million. This number was slightly higher than the 2016-17 to 2020-21 fiscal year average of 41M CYPs procured annually. Injectable procurement continued at similar levels in 2020-2021 as in 2019-2020 (volumes procured were down by only 6 percent in 2020-2021, as compared to 2019-2020, at the time of reporting). IUDs continued to comprise the majority of CYPs provided in the MOHFW basket in 2020-2021; a total of 34M out of 44M CYPs provided were from IUDs.

Although the MOHFW reports annual shipment volumes based on a fiscal year schedule, instead of the calendar years used in this report, for simplicity the same prices (in Exhibit C.7) were used to estimate the implied annual market value for supplier shipment and MOHFW procurement volumes. These calculations show MOHFW procurement values of approximately $54 million in the 2019-20 fiscal year and $34 million in the 2020-21 fiscal year, compared to the $1 million and $2 million implied by the 2019 and 2020 supplier shipment data.

Exhibit E.2: Annual reports of Department of Health & Family Welfare (includes fiscal years 2016-17 to 2020-21)

Exhibit E.2.1: Quantities supplied to States/UTs (publicly-available data)

Contraceptives	2016-17	2017-18	2018-19	2019-20	2020-21*
Condoms (In million pieces)	432.8	526.8	0.0	378.1	397.1
Oral Pills (In lakh cycles)	312.0	275.3	394.4	591.6	427.6
IUDs (In lakh pieces)	48.1	22.6	88.5	87.7	73.8
Emergency Contraceptive Pills (in lakh packs)	60.8	50.4	128.0	195.7	131.7
Centchroman Contraceptive Pill (Lakh Strips)	7.1	24.0	170.3	116.7	117.7
Injectable Contraceptive (Lakh Doses)	0.0	27.0	0.0	31.5	29.3

Exhibit E.2.2: Social marketing sales of contraceptives (publicly-available data)

Contraceptives	2016-17	2017-18	2018-19	2019-20	2020-21*
Condoms (Million pieces)	399.0	483.2	459.5	507.5	91.8
Oral Pills (Social Marketing) (lakh cycles)	194.3	205.3	159.2	147.1	16.2
SAHELI (in Lakh tablets)	321.8	321.8	77.5	0.0	0.0

*Figures are Provisional

39 Government of India, Ministry of Health and Family Welfare, "Annual Report of Department of Health & Family Welfare for the year of 2020-21", "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", available at: **https://main.mohfw.gov.in/documents/publication** and **https://main.mohfw.gov.in/documents/publication/publication-archives**

40 The fiscal year for India runs from April 1 to March 31. Accordingly, all values from the most recent year are provisional; not all data has been reported at the time of publishing (for MOHFW reports).

41 Only modern contraceptive methods from India's MOHFW reports, including condoms, injectables, IUDs, and oral contraceptives, are included in this analysis.

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 (or volumes, if applicable) of shipment volumes in a market captured by a certain contraceptive method.

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 RH Viz data (male condoms) and historical supplier-reported shipment data (female condoms, implants, injectables, IUDs, and oral contraceptives) 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 Gross National Income 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
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
FP2020	FAMILY PLANNING 2020
RHSC	REPRODUCTIVE HEALTH SUPPLIES COALITION
RH VIZ	REPRODUCTIVE HEALTH SUPPLIES VISUALIZER
USAID	UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT
UNFPA	UNITED NATIONS POPULATION FUND

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* HELM AG was a participating supplier in the FP2020 Global Markets Visibility Project for the 2015, 2016 and 2017 Family Planning Market Reports. In September 2017, HELM AG sold its wholly-owned subsidiary company, HELM Medical GmbH, to Sanavita Pharmaceuticals GmbH. Refer to page 18-19 for more information on HELM AG and other participating suppliers.

** CHAI began collecting data directly from suppliers in the former GEMS Caucus in 2018.

CLINTON HEALTH ACCESS INITIATIVE

Reproductive Health SUPPLIES COALITION