



FAMILY PLANNING MARKET REPORT

DECEMBER 2018

ACKNOWLEDGEMENTS:

This report was produced as part of the landmark FP2020 Global Markets Visibility Project that the Clinton Health Access Initiative, Inc. (CHAI) launched in early 2014 in conjunction with the Reproductive Health Supplies Coalition (RHSC).

The shipment data provided by suppliers is the foundation of the report's analyses, and allows CHAI to address information gaps and construct a more comprehensive view of the reproductive health commodities market. We would like to thank current participating suppliers (Bayer, CR Zizhu, Cipla, Cupid, Female Health Company, Helm AG*, Merck (MSD), Mylan, Pfizer, Pregna, PT Tungal, Shanghai Dahua, SMB, and Techno Drugs), as well as our partner, the Concept Foundation, for their support in collecting and aggregating data from the Generic Manufacturers for Reproductive Health (the GEMS Caucus).

We are also grateful to our colleagues from the Coordinated Supply Planning Group (CSP), John Snow Inc. (JSI), United Nations Population Fund (UNFPA), the United States Agency for International Development (USAID), the Global Health Supply-Chain – Procurement and Supply-Management (GHSC-PSM), and FP2020, for their invaluable feedback during the development and refinement of various market analyses.

* 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 17 for more information on HELM AG and other participating suppliers.

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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 2018 Family Planning Market Report covers 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 countries¹. The report covers all product-based modern methods based on historical supplier-reported shipment data collected from 14 suppliers² for female condoms, implants, injectables, IUDs, orals (combined and progestin only), and emergency oral contraceptives. Findings for male condoms are based on data from the Reproductive Health Interchange.

COMPARED TO 2011³, THE VALUE OF THE FP2020 PUBLIC SECTOR MARKET⁴ IN 2017 SAW A CONTINUATION OF THE DOWNWARD TREND EVIDENCED SINCE 2011. THIS SUBSTANTIAL DECLINE OVER THIS SIX-YEAR PERIOD IS PRIMARILY DRIVEN BY AN OVERALL DECREASE IN THE SHIPMENTS OF ORALS (COMBINED AND PROGESTIN ONLY) AND INJECTABLES⁵, AND, TO SOME EXTENT, OFFSET BY AN INCREASE IN SHIPMENTS OF IMPLANTS.

CYPs⁶ SHIPPED DECLINED AT A SIMILAR RATE OVER THE SAME PERIOD, DRIVEN MAINLY BY A DECREASE IN IUDs AND ORALS (COMBINED AND PROGESTIN ONLY) AND SOMEWHAT OFFSET BY AN INCREASE IN IMPLANTS.

This section analyzes trends in shipment volumes, value in USD, and CYPs shipped in the total FP2020 public sector market from 2011 to 2017. Analyses are based on the supplier shipment data from the 14 suppliers participating in this report for all product-based methods except for male condoms; analyses for male condoms are based on data from the Reproductive Health Interchange (RHI).

The value of the public sector market in the 69 FP2020 focus countries has decreased from \$277 million⁷ in 2011 to \$186 million in 2017. The decrease in value was more pronounced from 2015 to 2016⁸; prior to 2016, the value was relatively flat⁹ (Exhibits 1 & 2).¹⁰

2017 represented the largest decline in total couple years of protection (CYPs) shipped, an estimate of the duration of contraceptive protection provided through products shipped, in a single year since 2011. CYPs fell from 110 million in 2011 to 78 million in 2017, well below the range of 104 million to 123 million CYPs shipped from 2011 to 2016. This decline was primarily driven by a decline in shipments of orals (combined and progestin only) from 2011 to 2016, and IUDs from 2016 to 2017. (Exhibit 3)

Although CYPs shipped from long-acting reversible contraceptive (LARC)¹¹ methods have declined 3 percent annually¹² from 57 million in 2011 to 47 million in 2017, CYPs shipped from short-acting methods¹³ have declined faster at 8 percent annually from 53 million in 2011 to 32 million in 2017. As a result, LARCs continue to dominate the CYP mix¹⁴, driven by implant shipments. (Exhibits 1, 3, 5)

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 from 2011 to 2017 of the Reproductive Health Interchange (RHI), with the exception of IUDs and emergency oral contraceptives, which represent >51 percent; see Appendix C.1 for further details. Additionally, the total quantities of the Market Report have on average been greater than total quantities seen in RHI for each method; see Appendix C.5 for further details.

3. 2011 is the first year of data collected and provides a picture of the value of the market before the London Family Planning Summit in 2012.

4. The FP2020 Public Sector Market in this report is defined as volumes purchased by institutional buyers (USAID, UNFPA, SMOs, etc.) and Ministry of Health (MOH) or government-affiliated procurers for the 69 FP2020 focus countries (defined as countries with a 2010 gross national income per capita less than or equal to \$2,500).

5. Injectables data from Pfizer include all institutional procurement at the Global level, but do not include government-funded orders received and processed in individual countries.

6. 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.8 for further details.

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

8. The largest decline in the overall value in a single year was recorded from 2015 to 2016 from

\$274 million to \$192 million. This was due to a decline in shipments across all methods (with the exception of IUDs), and most notably a sharp decline among injectables. The prices for injectables and orals remained relatively stable from 2015 to 2016, indicating the decrease was driven by volume.

9. Prior to 2016, the value of the market remained relatively stable, with the exception of an increase in 2012 driven by increased implant shipments prior to the 2013 reduced price. From 2011 to 2017, the value of the implant market saw an annual increase of only three percent compared to the annual increase of 18 percent in shipment quantities, due to the implant price reductions in 2013, which allowed more implants to be purchased with the same amount of funding.

10. Other than implants, there have not been significant changes in price for other methods of contraceptives; hence, changes in the value of the market are mostly attributed to changes in shipment volumes. Prices used to calculate the value of the market for each method by year are listed in Appendix C.

11. Long-acting and reversible contraceptive methods include IUDs and implants.

12. Where percentage changes are discussed, the Compound Annual Growth Rate (CAGR) is used unless otherwise noted.

13. Short-acting methods include male and female condoms, injectables, orals (combined & progestin only) and emergency oral contraceptives.

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

The most pronounced trend observed from the 2017 supplier shipment data was a single-year decline from 2016 to 2017 in IUD shipments which accounted for most of the decline in CYPs shipped. At a cost per CYP of \$0.10, IUDs are by far the most cost effective method. As a result, the total value of the market remained relatively unchanged. During this period, the market share of LARCs decreased by only 10 percent while the CYP mix for LARCs declined at a faster rate of 18 percent.¹⁵ (Exhibit 1, 3, 4, 5)

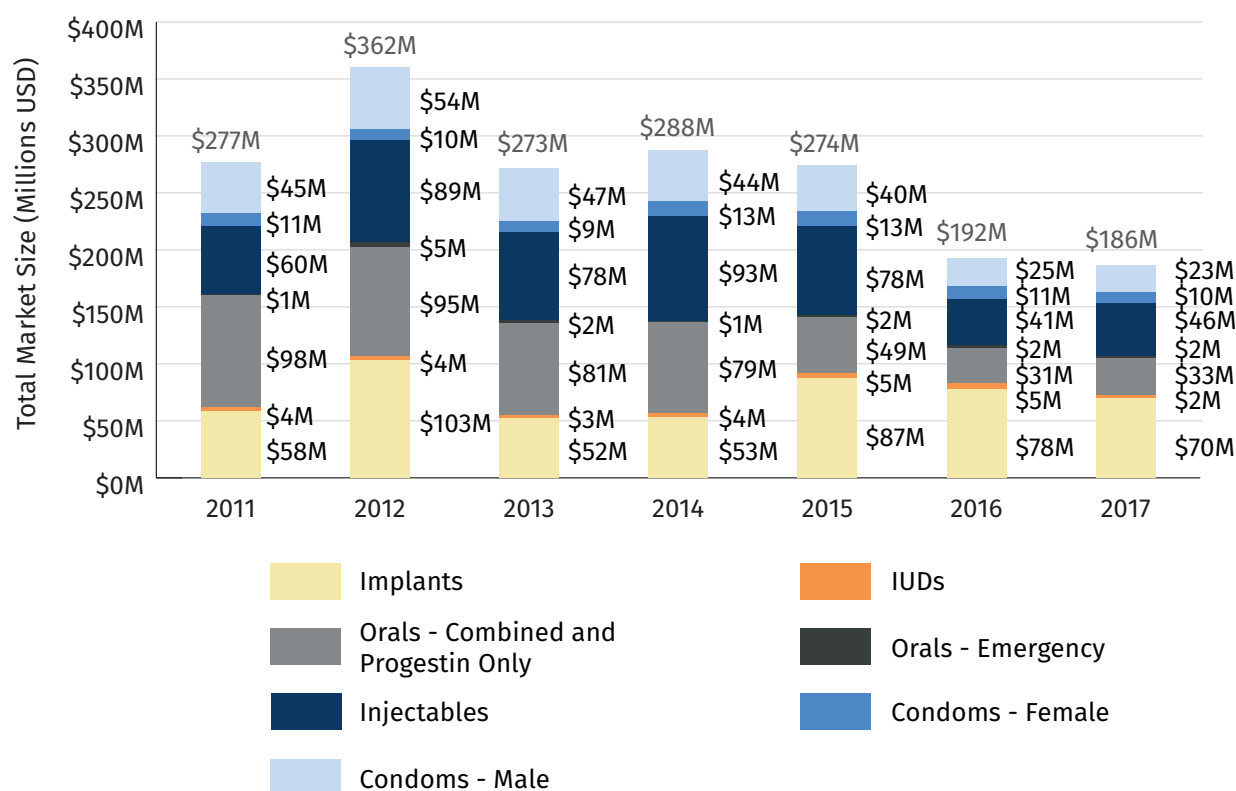
In 2017, 10 countries represented just over half of the total value of the FP2020 public sector market.¹⁶ This trend, which includes five core countries¹⁷, has remained relatively stable over the past four years. (Exhibits 6, 7, 8)

15. It should be noted that the observed trend occurred over a single year and may be attributed in part to the nature of shipment data and factors such as shipment timing and other procurement factors further explored on page 16. As also discussed in the 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.

16. (in alphabetical order) Burkina Faso, Democratic Republic of Congo, Ghana were part of the top 10 countries which accounted for over 50 percent of the value in the FP2020 public sector market in 2016; however, they are not part of the top 10 countries by value in 2017.

17. (in alphabetical order) Bangladesh, Ethiopia, Nigeria, Uganda and Zimbabwe have consistently appeared in the top 10 markets from 2013 to 2017.

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



METHOD	YOY* 2016-2017	CAGR** 2011-2017
Condoms – Female	-6%	-2%
Condoms – Male	-8%	-10%
Implants	-10%	3%
Injectables	12%	-4%
IUDs	-55%	-12%
Orals – Combined & Progestin Only	9%	-16%
Orals - Emergency	-22%	8%
Total	-3%	-6%

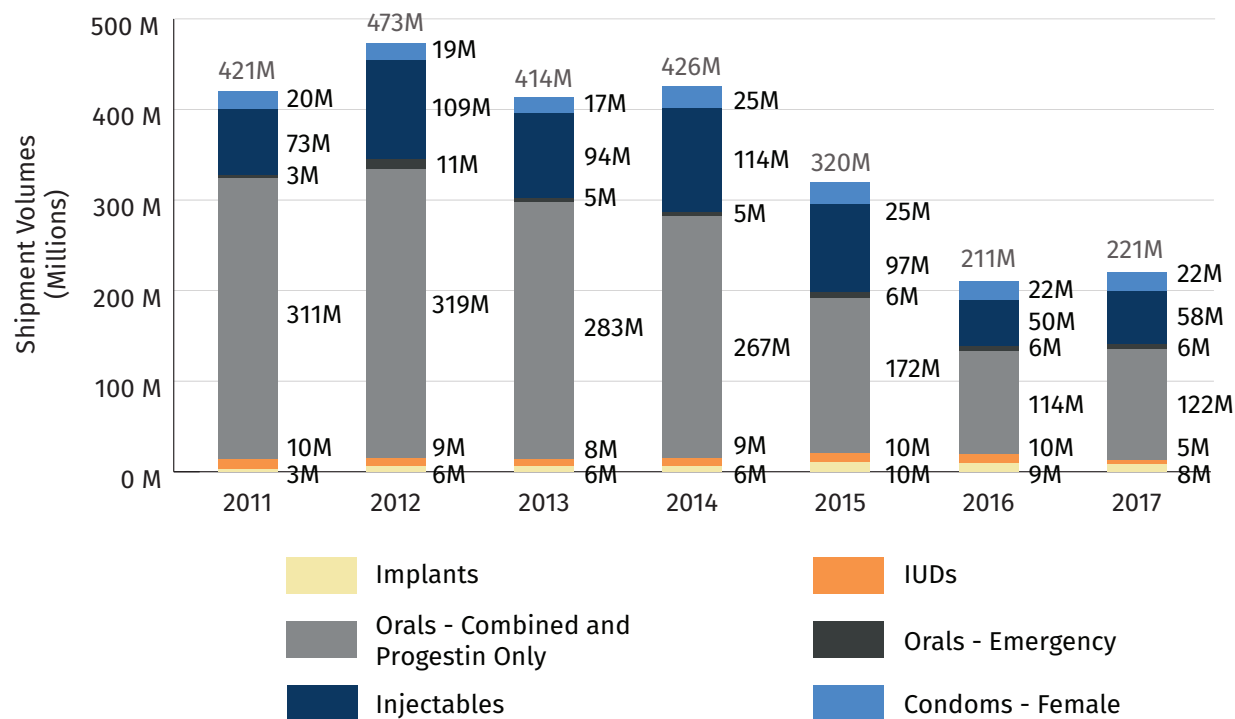
* Year over year (YOY)

** Compound Annual Growth Rate (CAGR)

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] UNFPA Contraceptive Price Indicator, 2011–2017; [4] IAP Implant Price

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



*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

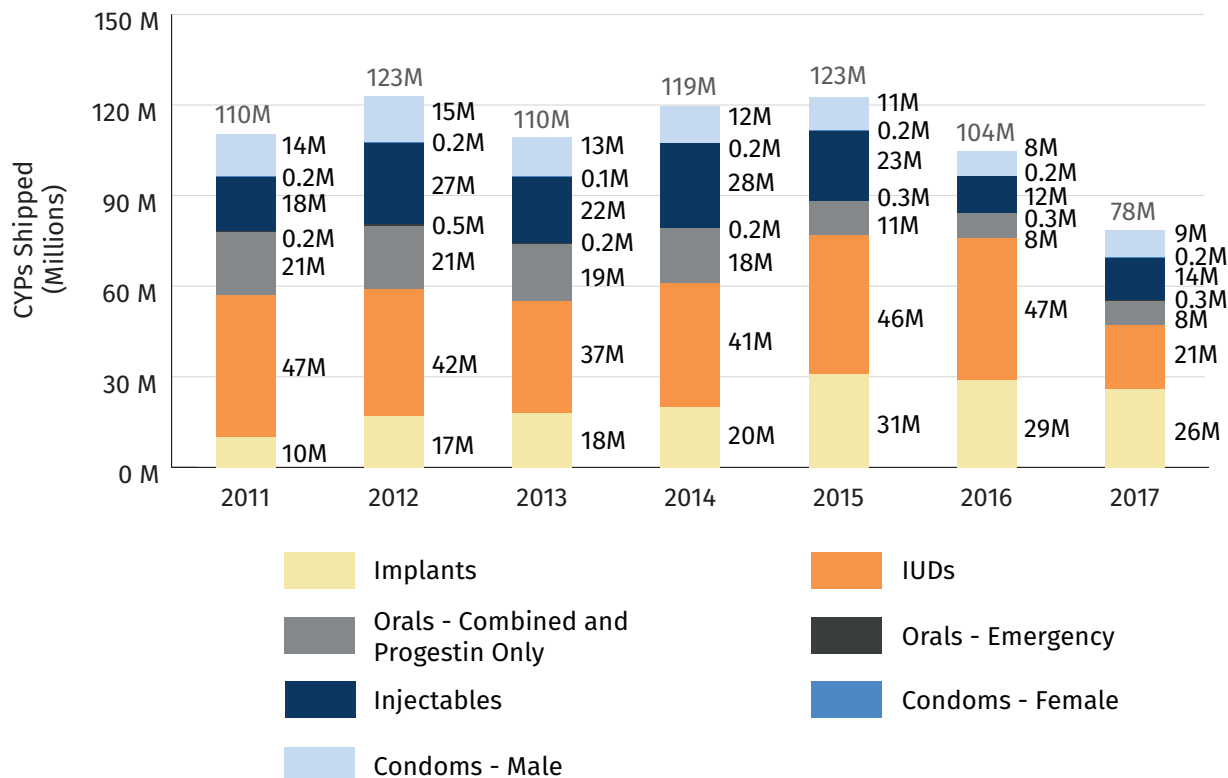
METHOD	YOY 2016-2017	CAGR 2011-2017
Condoms – Female	1%	2%
Implants	-10%	18%
Injectables	16%	-4%
IUDs	-55%	-13%
Orals – Combined & Progestin Only	7%	-14%
Orals - Emergency	6%	13%

MALE CONDOM SHIPMENT VOLUMES (BILLIONS)									
2011	2012	2013	2014	2015	2016	2017	YOY 2016-2017	CAGR 2011-2017	
1.62	1.84	1.57	1.49	1.36	1.00	1.03	3%	-7%	

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018

EXHIBIT 3: CYPs SHIPPED TO THE FP2020 PUBLIC SECTOR MARKET



METHOD	YOY 2016-2017	CAGR 2011-2017
Condoms – Female	1%	2%
Condoms – Male	3%	-7%
Implants	-10%	18%
Injectables	17%	-4%
IUDs	-55%	-13%
Orals – Combined & Progestin Only	7%	-14%
Orals - Emergency	6%	13%
Total	-25%	-5%

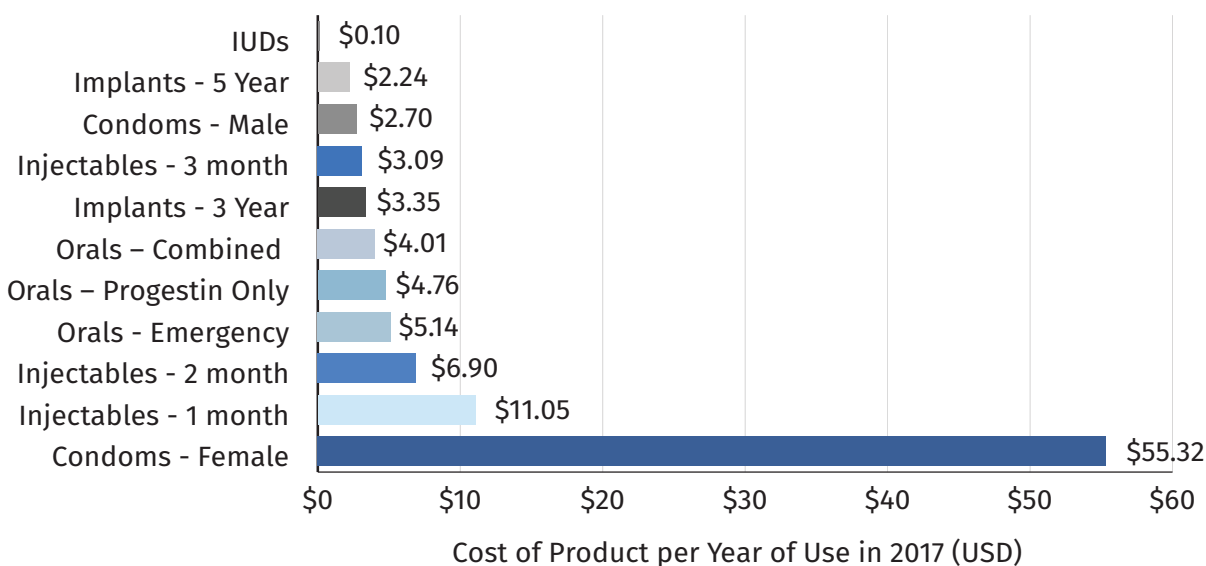
Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] USAID, "Couple-Years of Protection (CYP)", May 2018

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

METHOD	UNITS PER CYP	UNIT COST							COST PER CYP						
		2011	2012	2013	2014	2015	2016	2017	2011	2012	2013	2014	2015	2016	2017
Condoms - Female	120.00	\$0.56	\$0.55	\$0.54	\$0.53	\$0.52	\$0.49	\$0.46	\$67.02	\$66.42	\$65.04	\$63.36	\$62.40	\$59.28	\$55.32
Condoms - Male	120.00	\$0.03	\$0.03	\$0.03	\$0.03	\$0.03	\$0.03	\$0.02	\$3.34	\$3.52	\$3.56	\$3.57	\$3.51	\$3.03	\$2.70
Injectables - 1 month	13.00	\$0.84	\$0.85	\$0.84	\$0.85	\$0.85	\$0.85	\$0.85	\$10.92	\$11.05	\$10.95	\$11.05	\$11.05	\$11.05	\$11.05
Injectables - 2 month	6.00	N/A	N/A	\$1.30	\$1.30	\$1.15	\$1.15	\$1.15	N/A	N/A	\$7.80	\$7.80	\$6.90	\$6.90	\$6.90
Injectables - 3 month*	4.00	\$0.82	\$0.82	\$0.78	\$0.79	\$0.78	\$0.80	\$0.77	\$3.27	\$3.27	\$3.12	\$3.17	\$3.13	\$3.20	\$3.09
Orals - Combined	15.00	\$0.31	\$0.30	\$0.28	\$0.30	\$0.28	\$0.26	\$0.27	\$4.70	\$4.44	\$4.26	\$4.43	\$4.20	\$3.95	\$4.01
Orals - Progestin Only	15.00	\$0.32	\$0.32	\$0.31	\$0.31	\$0.32	\$0.33	\$0.32	\$4.84	\$4.85	\$4.64	\$4.60	\$4.80	\$4.92	\$4.76
Orals - Emergency	20.00	\$0.34	\$0.49	\$0.44	\$0.30	\$0.37	\$0.35	\$0.26	\$6.74	\$9.74	\$8.84	\$5.92	\$7.40	\$7.02	\$5.14
Implants - 3 Year*	0.40	\$18.20	\$17.92	\$8.50	\$8.50	\$8.50	\$8.50	\$8.35	\$7.28	\$7.17	\$3.40	\$3.40	\$3.40	\$3.40	\$3.35
Implants - 5 Year	0.26	\$19.43	\$18.05	\$8.50	\$8.50	\$8.50	\$8.50	\$8.50	\$5.11	\$4.75	\$2.24	\$2.24	\$2.24	\$2.24	\$2.24
IUDs	0.22	\$0.43	\$0.43	\$0.43	\$0.48	\$0.47	\$0.46	\$0.47	\$0.09	\$0.09	\$0.09	\$0.10	\$0.10	\$0.10	\$0.10

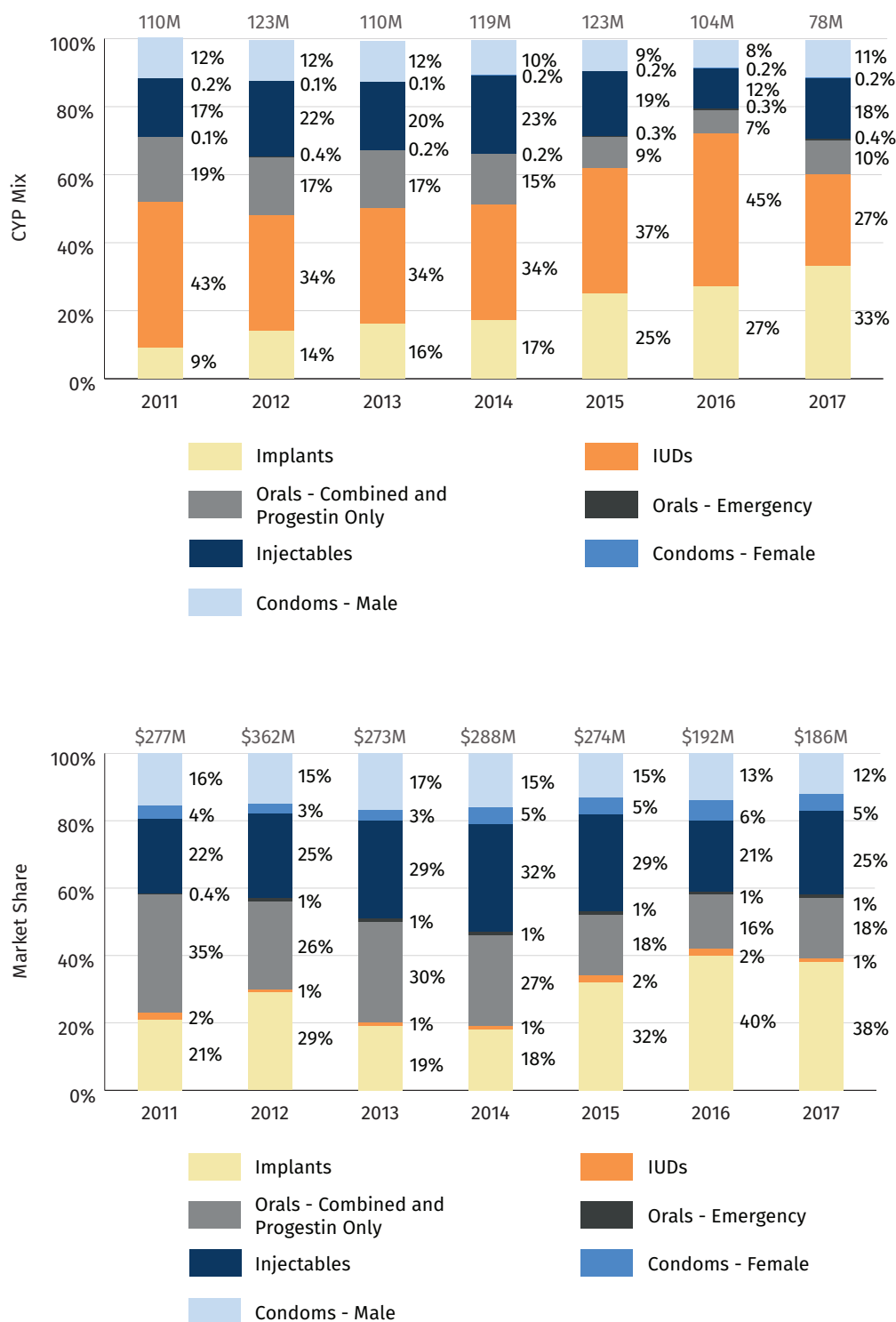
*Weighted average price. Weighted average price is calculated based on prices and volumes available in the UNFPA Contraceptive Price Indicator. The 3-month injectable price is based on DMPA IM and DMPA SC; the 3 year implant year price is based on Levoplant and Implanon NXT.



Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] UNFPA Contraceptive Price Indicator, 2011–2017; [2] USAID, "Couple-Years of Protection (CYP)"; [3] IAP Implant Price

EXHIBIT 5: CONTRACEPTIVE SHIPMENT MIX (IN TERMS OF VOLUMES), CYP MIX (IN TERMS OF CYPs SHIPPED), AND MARKET SHARE (IN TERMS OF DOLLARS) OF THE FP2020 PUBLIC SECTOR MARKET

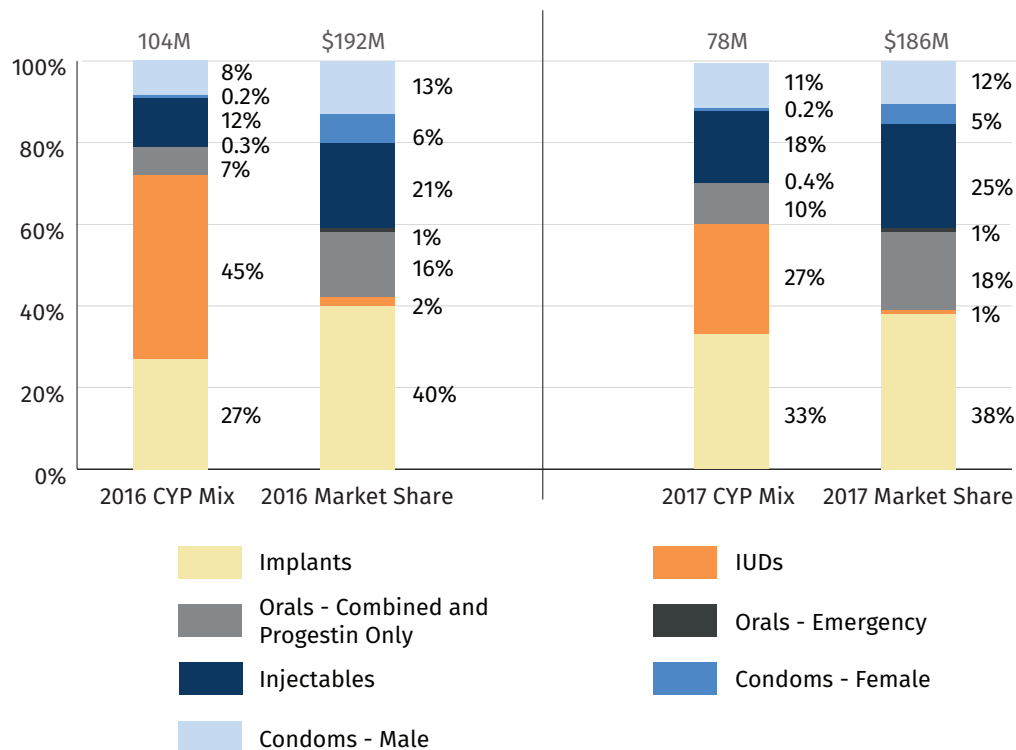


Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] UNFPA Contraceptive Price Indicator, 2011–2017; [4] USAID, "Couple-Years of Protection (CYP)," May 2017; [6] IAP Implant Price.

EXHIBIT 5: CONTRACEPTIVE SHIPMENT MIX (IN TERMS OF VOLUMES), CYP MIX (IN TERMS OF CYPs SHIPPED), AND MARKET SHARE (IN TERMS OF DOLLARS) OF THE FP2020 PUBLIC SECTOR MARKET (CONTINUED)

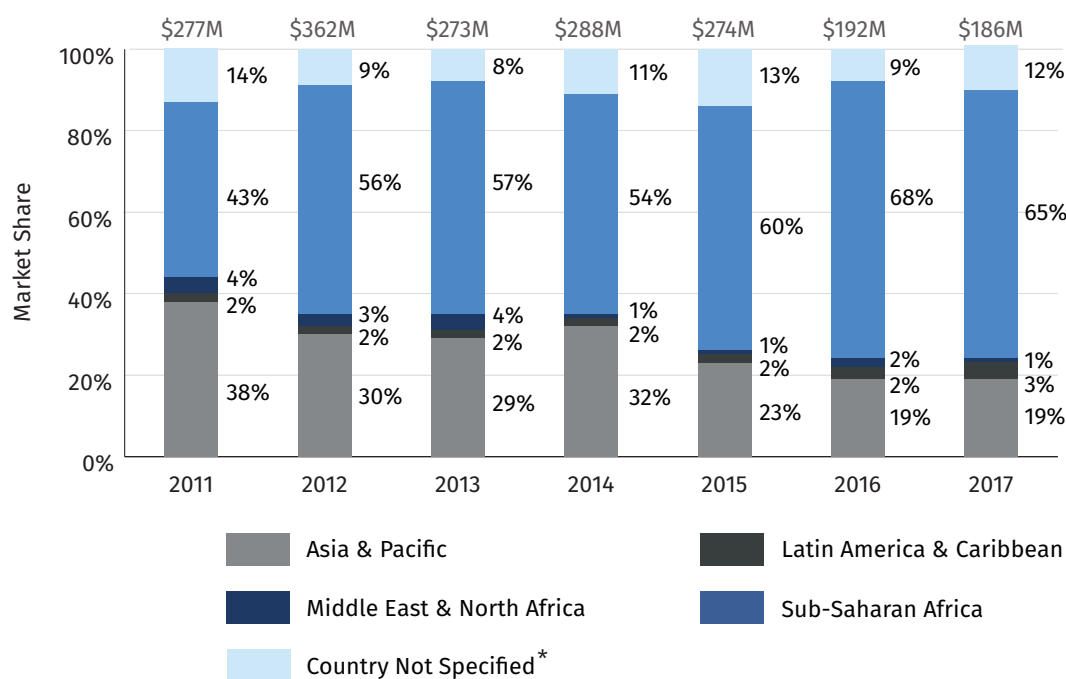
SHIPMENT MIX (IN TERMS OF VOLUMES)	2011	2012	2013	2014	2015	2016	2017
Condoms - Female	1.0%	0.8%	0.9%	1.3%	1.5%	1.8%	1.8%
Condoms - Male	79.4%	79.6%	79.2%	77.8%	80.9%	83%	82%
Implants	0.2%	0.2%	0.3%	0.3%	0.6%	0.8%	0.7%
Injectables	3.6%	4.7%	4.7%	5.9%	5.8%	4.1%	4.6%
IUDs	0.5%	0.4%	0.4%	0.5%	0.6%	0.8%	0.4%
Orals - Combined & Progestin Only	15.2%	13.8%	14.3%	13.9%	10.2%	9.4%	9.7%
Orals - Emergency	0.1%	0.5%	0.2%	0.3%	0.4%	0.5%	0.5%
Total Volumes	2.04 B	2.32 B	1.98 B	1.92 B	1.68 B	1.21 B	1.25 B



Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] UNFPA Contraceptive Price Indicator, 2011–2017; [4] USAID, "Couple-Years of Protection (CYP)," May 2018; [6] IAP Implant Price.

**EXHIBIT 6: MARKET SHARE OF FP2020
PUBLIC SECTOR BY REGION (USD)**



*The "Countries Not Specified" represents the proportion of shipment volumes to procurer warehouses where the final FP2020 destination is not specified. See Appendix C for further details.

VALUE OF THE FP2020 PUBLIC SECTOR MARKET BY REGION (USD)	2011	2012	2013	2014	2015	2016	2017
Asia & Pacific	\$105 M	\$110 M	\$80 M	\$93 M	\$64 M	\$36 M	\$35 M
Latin America & Caribbean	\$4 M	\$6 M	\$6 M	\$5 M	\$6 M	\$5 M	\$5 M
Middle East & North Africa	\$10 M	\$9 M	\$10 M	\$4 M	\$3 M	\$4 M	\$2 M
Sub-Saharan Africa	\$120 M	\$202 M	\$155 M	\$154 M	\$164 M	\$131 M	\$122 M
Total Regions	\$239 M	\$328 M	\$251 M	\$256 M	\$237 M	\$175 M	\$164 M
Countries Not Specified	\$38 M	\$34 M	\$21 M	\$32 M	\$37 M	\$17 M	\$23 M
Total	\$277 M	\$362 M	\$273 M	\$288 M	\$274 M	\$192 M	\$186 M

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] UNFPA Contraceptive Price Indicator, 2011–2017; [4] IAP Implant Price

EXHIBIT 7: TOP 10 COUNTRIES IN TERMS OF
VALUE, 2017

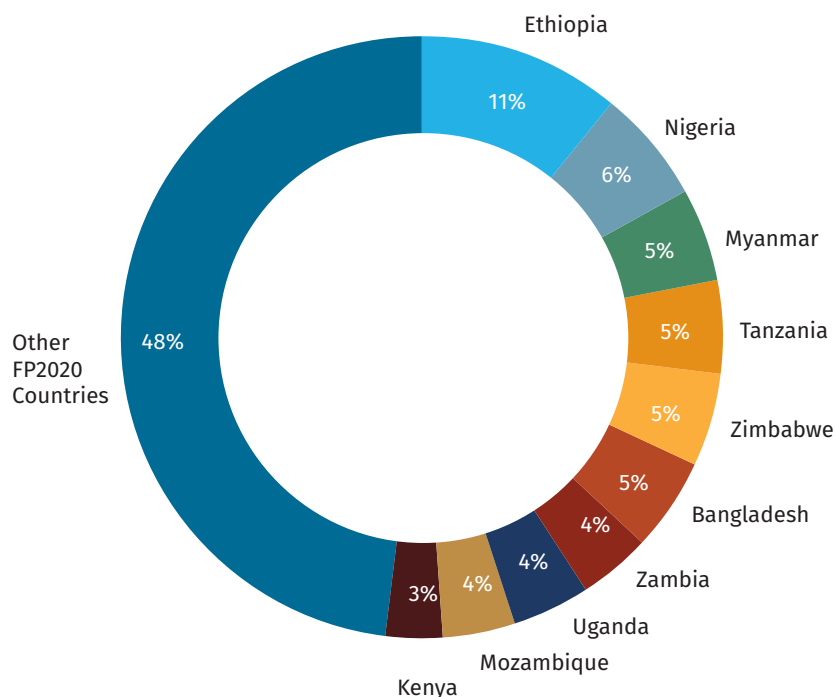
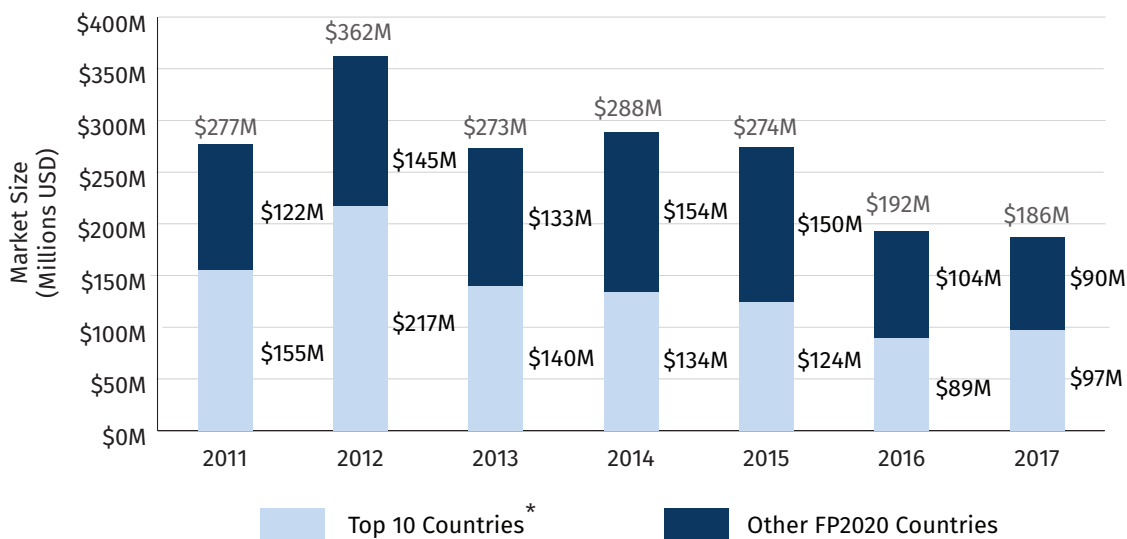


EXHIBIT 8: VALUE OF 10 LARGEST FP2020 PUBLIC SECTOR COUNTRIES
COMPARED TO VALUE OF ALL OTHER COUNTRIES COMBINED



* Top countries defined by 2017 data. Top 10 countries are, in alphabetical order, Bangladesh, Ethiopia, Kenya, Mozambique, Myanmar, Nigeria, Tanzania, Uganda, Zambia, and Zimbabwe.

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018; [3] UNFPA Contraceptive Price Indicator, 2011–2017; [4] IAP Implant Price

EXPENDITURES BY THE TWO LARGEST INSTITUTIONAL PROCURERS OF FAMILY PLANNING COMMODITIES, USAID AND UNFPA, HAVE REMAINED FLAT OR DECREASED SINCE 2012.

This section looks at data from the “Overview of Contraceptive and Condom Shipment” reports by USAID and data from the Procurement Services Branch of UNFPA to understand historical spend by the two major institutional procurers for the 69 FP2020 public sector markets.

From FY2012¹⁸ to FY2015, the annual value¹⁹ of all contraceptives shipped by USAID, excluding male and female condoms²⁰, to the 69 FP2020 countries remained relatively flat between \$58 million and \$77 million. The FY2016 shipped value of \$46 million was 37 percent less than in FY2015, and the value in FY2017 of \$34 million was 25 percent less than FY2016. These decreases were attributed to a transition from the USAID | DELIVER project²¹ to the GHSC-PSM project²². As cited in USAID’s “Overview of Contraceptive and Condom Shipments” FY2017 report, programs had prepared for this change by increasing shipments in FY2015.²³ (Exhibit 9)

Overall, from 2012 to 2017, the value²⁴ of contraceptives procured by UNFPA decreased by 2 percent annually. From 2012 to 2015, procurement values remained flat between \$108 million and \$120 million. While a substantial 27 percent decrease was observed in 2016, the value of UNFPA’s procurement increased by 25 percent in 2017, although not reaching pre-2016 levels. (Exhibit 10)

18. USAID Fiscal Year (FY) runs from Oct. 1 to Sept. 30.

19. USAID values are based on shipment data for FP2020 countries and are inclusive of product and freight costs. Values are taken from the USAID annual “Overview of Contraceptive and Condom Shipments” reports from FY2011 to FY2017.

20. The FY2017 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 2011 to 2017 to compare a consistent data set across years.

21. The USAID | DELIVER project was implemented by John Snow Inc. and worked to strengthen supply chains, delivering technical assistance and medicines and health supplies including contraceptives, to developing countries around the world from 2006–2016. Available at: <https://www.jsi.com/JSIInternet/IntlHealth/techexpertise/display.cfm?tid=1000&id=79&xid=2055>

22. USAID awarded the current contract for procuring and delivering medicines and commodities and providing supply-chain technical assistance to countries in 2015: It is called the Global Health Supply-Chain - Procurement and Supply-Management Project (GHSC-PSM). <https://www.usaid.gov/news-information/congressional-testimony/may-17-2018-sdaa-global-health-irene-koek-supply-chain>

23. USAID, Overview of Contraceptive and Condom Shipments available at https://pdf.usaid.gov/pdf_docs/PA00T4T9.pdf

24. UNFPA procurement values reflect all contraceptive procurement conducted by UNFPA for FP2020 countries including fresh production (purchase orders) and requests satisfied using stock; values are inclusive of product costs and exclude services such as freight, sampling, inspection, and testing. Values are provided by UNFPA Procurement Services Branch.

EXHIBIT 9: USAID CONTRACEPTIVE (EXCLUDING MALE AND FEMALE CONDOMS) SHIPMENT VALUES TO FP2020 COUNTRIES (USD)

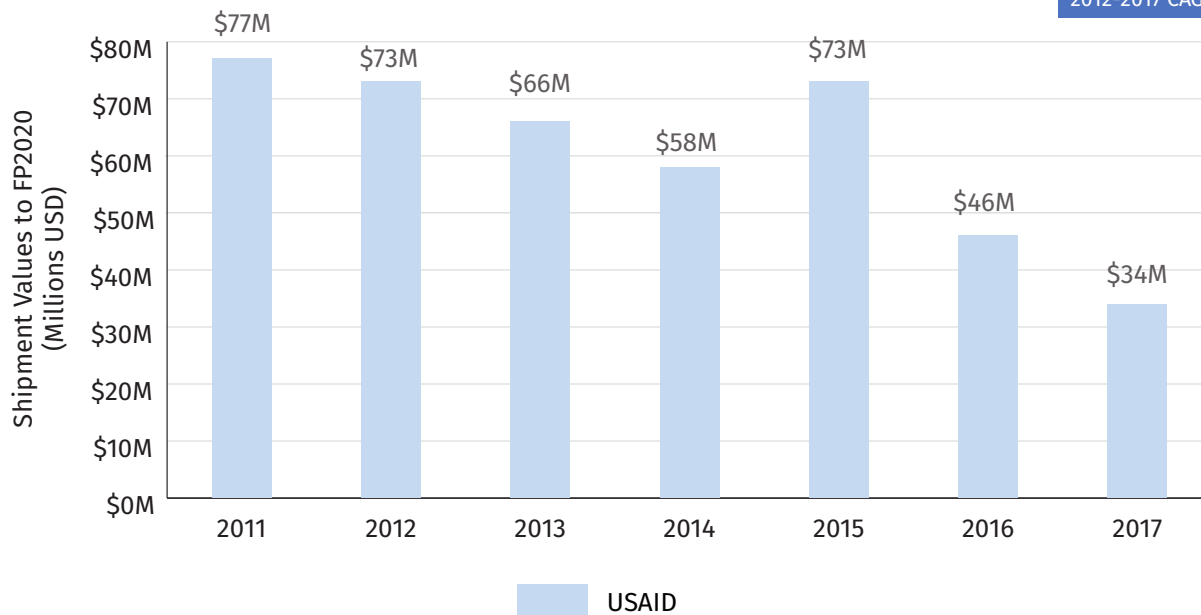
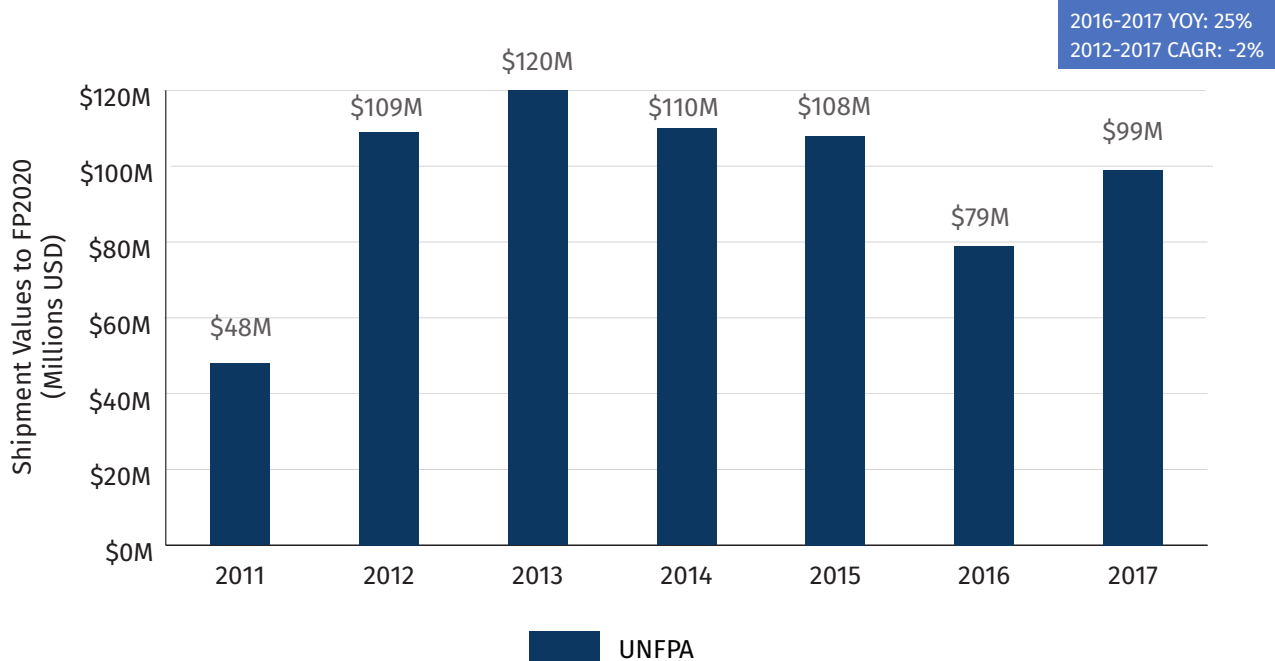


EXHIBIT 10: UNFPA PROCUREMENT VALUE - CONTRACEPTIVES TO FP2020 COUNTRIES (USD)



Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding

Sources: [1] USAID Worldwide Contraceptive and Condom Shipments FY 2011 – 2017; [2] UNFPA PSB Procurement Values 2011 – 2017

THE UNCERTAINTY SURROUNDING THE AVAILABILITY OF FUTURE FUNDING CONTINUES TO IMPACT THE MARKET FOR FAMILY PLANNING COMMODITIES IN A SIGNIFICANT WAY.

Uncertainties over longer-term donor funding remains a critical factor in determining the health of this market. The 2017 UNFPA Supplies annual report highlights new donor contributions and commitments which, if realized, could significantly improve the availability of financing for contraceptive commodities in 2018.²⁵ However, there is uncertainty around overall family planning funding²⁶. The 2018 RHSC Global

Contraceptive Commodity Gap Analysis identified growing funding gaps every year until 2020. Should the funding challenges remain unaddressed, the family planning contraceptive product market could decline further and, subsequently, the number of users on modern methods of contraception could cease to grow or even decrease.

25. UNFPA Supplies Annual Report 2017, available at <https://www.unfpa.org/unfpa-supplies-annual-report-2017>

26. Uncertainty around overall family planning funding includes funding from the U.S government. Family planning and reproductive health (FP/RH) funding totals \$633 million in the Senate-approved FY19 State & Foreign Operations appropriations bill, compared to the FY18 enacted level of \$608 million, the House FY19 level of \$461 million, and the FY19 Request of \$331 million. Henry J. Kaiser Family Foundation, June 2018. Available at: <https://www.kff.org/news-summary/senate-appropriations-committee-approves-fy19-state-and-foreign-operations-sfops-appropriations-bill/>

CHAI CONSULTED A NUMBER OF SUPPLIERS, DONORS, AND OTHER FAMILY PLANNING PARTNERS TO DISCUSS THE TRENDS OBSERVED IN THE REPORT.

Those consulted voiced concern that the value of the FP2020 public sector market had not rebounded to pre-2016 levels. Many also raised concerns with regard to the continued decrease in donor spending since the 2012 London Family Planning Summit where many donors committed to increase spending. They also pointed to growing funding gaps for contraceptive products.

Certain stakeholders proposed explanations for the more prominent observed trends from the supplier shipment data. For example, suggested reasons for the IUD shipment decline from 2016 to 2017 included: the devaluation of the Egyptian Pound against the U.S. dollar²⁷ leading to decreased international procurement of health products including IUDs in Egypt, the discontinuation of USAID's funding support for contraceptive products in Pakistan^{28,29}, and cyclical procurement patterns for the remaining top markets. As for the decrease observed in implant shipments from 2016 to 2017, supplier production capacity constraints were cited as contributing reasons at a Coordinated Supply Planning (CSP) meeting³⁰.

The very nature of the supplier shipment data may also impact year-to-year trends. For instance, total annual volumes provided by suppliers are recorded when they are shipped, which differ in timing from when orders are procured. As a result, some orders procured in certain years may ship in subsequent years based on manufacturing lead times and thus one-year fluctuations are not necessarily a result of programmatic shifts.

As also discussed in the 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."³¹

For the above outlined reasons, this report focuses on multi-year trends as opposed to single-year trends.

27. The Egyptian Pound was devalued in late 2016. <https://www.businessinsider.com/egypt-un-pegs-the-egyptian-pound-from-us-dollar-2016-11>

28. USAID, Overview of Contraceptive and Condom Shipments FY 2016. "Order requests for FY 2016 declined in values and quantities for all six contraceptive methods compared with FY 2015: orals, injectables, implants, intrauterine devices (IUDs), male condoms, and female condoms. When looking at the past three years, only IUDs show a year-over-year decline. This decline is attributed to a decline in orders from Pakistan as the government begins to take responsibility for procuring products." Available at: https://www.usaid.gov/sites/default/files/documents/1864/C-C_FY16.pdf

29. USAID, Overview of Contraceptive and Condom Shipments FY 2017. [On IUDs] "Asia's precipitous decline in FY17 of 97 percent can be attributed mainly to Pakistan, which had no order requests after having accounted for the most orders of all countries the previous two years. This reflects the government plan to begin taking responsibility for procuring commodities there." Available at: https://pdf.usaid.gov/pdf_docs/PA00T4T9.pdf

30. USAID Global Health Supply Chain Program, Procurement and Supply Chain Management, Fiscal Year 2018, Q3 Report https://www.ghsupplychain.org/sites/default/files/2018-09/GH-SC-PSM_2018_Q2.pdf

31. 2016 Commodity Gap Analysis, RHSC. 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, since 2015, provided the reproductive health community with detailed assessments of the public sector family planning market across the 69 FP2020 countries. The initiative provides insightful and strategic outputs for donors, MOHs, implementing organizations, and suppliers to develop and implement more effective strategies for enabling women in the world's 69 poorest countries to use family planning products and services.

This report is a joint collaboration with 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 14 suppliers participating in the project. Donors, suppliers, and partners expressed strong interest to continue this project, build on our progress, and strengthen the family planning community's market knowledge.

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, LNG-IUS, combined 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, and reproductive health. Its contraceptive product portfolio includes emergency oral contraceptives and combined oral contraceptives. It also manufactures misoprostol.

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.

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 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 does not represent the entirety of institutional purchases for the FP2020 public sector, as it includes data from the majority, but not all of the suppliers associated with these markets.

Mylan

Mylan is a U.S. based healthcare company with over 7,500 marketed products. Its contraceptive product portfolio includes oral (combined, progestin only, and emergency) and injectable contraceptives, IUDs, and tubal rings used for female sterilization³².

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 report does 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.

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 (Ceralette, Exluton, Marvelon, and Zoely), contraceptive implants (Implanon) NXT and the contraceptive vaginal ring (NuvaRing) for non-FP2020 markets.

32. The procurement of products used for sterilization such as tubal rings is not covered in this report. This report's scope is limited to product-based modern methods of contraception.

Pfizer

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

Pregna

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

PT Tungal

PT. Tungal Idaman Abdi (PT Tungal) is a pharmaceutical manufacturer focusing on reproductive healthcare based in Indonesia. 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 product is 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 and injectables. For injectables, Techno Drugs has also served as a supplier to Helm AG previously.

APPENDIX A

69 FP2020 COUNTRIES MARKET VOLUMES BY METHOD³³ AND COUNTRY³⁴, 2011–2017

EXHIBIT A.1: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2011					
COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	19,572,826	0	1,395,200	67,000	807,674
Bangladesh	112,426,800	422,109	18,984,000	475,000	138,631,121
Benin	13,249,064	48,600	10,300	21,000	0
Bhutan	2,880,000	0	475,200	1,600	88,002
Bolivia	1,570,360	2,350	0	35,000	210,000
Burkina Faso	0	2,000	0	0	1,597,501
Burundi	14,673,200	44,600	0	39,000	33,335
Cambodia	1,764,000	19,000	0	20,000	20,000
Cameroon	0	11,500	0	31,000	50,200
Central African Republic	6,410,600	500	200	0	91,403
Chad	1,567,600	15,000	52,000	1,000	0
Comoros	1,008,000	1,024	26,800	100	0
Democratic Republic of Congo	73,252,800	8,500	350,000	26,000	1,295,595
Congo Rep	20,566,352	10	1,412,400	500	391,905
Cote d'Ivoire	34,967,400	0	630,800	10,000	2,613,145
Djibouti	590,240	0	0	1,500	0
Egypt Arab Rep	50,400	17,500	4,780,000	2,135,000	3,000,000
Eritrea	7,804,000	5,100	0	5,500	61,672
Ethiopia	146,223,384	382,704	5,471,200	420,000	7,752,440
Gambia	1,585,000	100	10,000	500	433,337
Ghana	5,514,000	57,674	3,044,000	0	0
Guinea	7,932,400	1,000	546,240	11,000	233,335
Guinea-Bissau	1,555,000	5,000	0	0	5,001
Haiti	54,534,096	0	976,800	0	200,001
Honduras	19,202,400	0	148,000	22,453	943,300
India	0	0	193,201	1,959,570	8,661,563
Indonesia	210,000	0	0	316,721	50,001
Iraq	0	0	0	75,000	2,633,250
Kenya	48,266,720	505,209	1,370,032	0	15,136,914
Korea Dem Rep	1,267,200	0	0	36,150	139,500
Kyrgyz Republic	5,202,600	0	0	160,000	0
Lao PDR	8,484,208	6,200	650,000	0	922,112
Lesotho	8,356,936	2,000	65,000	0	63,000
Liberia	22,048,800	3,000	423,200	0	0

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

34. Other FP2020 shipment volumes include shipments to procurer (USAID, UNFPA, SMOs) warehouses in non-FP2020 countries, such as Belgium, Denmark, France, Germany, Netherlands, Norway, Sweden, Switzerland, UK, and USA. Although these volumes were shipped

to non-FP2020 countries, the end shipment destination of these volumes would likely be the 69 FP2020. As a result, these non-FP2020 volumes were included in the total shipments to 69 FP2020 countries after it was confirmed that the specific non-FP2020 volumes were associated with institutional purchases.

APPENDIX A

EXHIBIT A.1: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2011

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Madagascar	24,254,800	124,318	1,913,600	4,500	324,550
Malawi	11,886,001	46,452	540,000	0	50,000
Mali	1,000	53,600	1,292,625	41,501	0
Mauritania	3,600,000	3,728	6,000	5,500	533,336
Mongolia	10,002,880	1,000	0	0	321,000
Mozambique	96,394,000	5,010	1,241,400	41,000	5,393,262
Myanmar	56,563,712	4,000	0	0	6,918,499
Nepal	33,641,000	0	327,600	10,000	250,000
Nicaragua	13,356,000	0	332,100	50,000	842,001
Niger	10,000	4,612	814,000	2,800	400,000
Nigeria	78,948,652	32,900	3,157,500	209,000	1,055,335
Pakistan	249,431,800	25,300	5,862,000	200,000	400,299
Papua New Guinea	2,500,000	2,000	0	0	1,663,200
Philippines	740,800	0	0	0	6,639,745
Rwanda	30,211,488	0	1,768,400	18,600	0
Sao Tome and Principe	2,190,600	0	852,075	200	47,129
Senegal	11,400,000	10,350	0	3,000	220,000
Sierra Leone	4,515,800	91,700	0	35,500	1,206,269
Solomon Islands	30,000	0	0	0	24,000
Somalia	0	0	0	0	0
South Sudan	4,161,000	0	0	0	0
Sri Lanka	779,600	10,000	0	80,000	2,191,240
Sudan	10,591,344	3,500	0	2,000	1,167,875
Tajikistan	10,105,072	5,440	0	150,000	0
Tanzania	29,772,456	240,104	6,176,400	25,000	1,410,170
Timor-Leste	57,600	1,100	0	3,500	145,002
Togo	14,392,368	16,500	0	6,400	12,663
Uganda	82,319,600	86,688	2,089,800	83,785	334,220
Uzbekistan	5,414,112	0	0	1,500,000	600,000
Vietnam	15,049,000	9,000	1,180,000	1,772,000	0
West Bank and Gaza	4,521,600	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	829,440	6,625	2,001,875	30,000	3,971,120
Zambia	58,807,168	0	1,544,200	0	748,000
Zimbabwe	126,944,000	61,900	782,500	2,600	14,836,223
Other FP2020 Shipment Volumes	6,937,864	692,800	385,700	145,850	76,285,355
Total Volumes	1,643,097,143	3,099,307	73,282,348	10,293,330	314,055,800

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

APPENDIX A

EXHIBIT A.2: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2012

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	12,418,680	3,000	619,300	30,000	199,470
Bangladesh	26,736,000	512,800	18,562,000	515,000	146,646,964
Benin	21,806,400	16,500	0	19,000	0
Bhutan	3,456,000	0	70,000	0	97,899
Bolivia	121,000	25,300	0	6,000	3,000
Burkina Faso	16,741,200	117,100	1,369,900	16,500	2,348,935
Burundi	6,272,000	120,000	996,000	175,000	608,160
Cambodia	748,656	29,676	307,600	58,650	1,125,338
Cameroon	3,162,000	12,300	0	20,000	17,840
Central African Republic	3,415,400	13,600	198,400	1,000	1,031,664
Chad	70,000	25,800	30,000	3,000	0
Comoros	576,000	500	15,000	0	17,199
Democratic Republic of Congo	148,830,600	46,800	1,344,000	39,000	4,210,965
Congo Rep	7,018,400	300	800,000	0	0
Cote d'Ivoire	37,371,000	16,456	700,000	0	2,455,000
Djibouti	519,680	0	0	500	96,000
Egypt Arab Rep	2,185,920	45,000	5,000,000	338,000	4,746,366
Eritrea	100,000	100	0	0	21,600
Ethiopia	173,877,714	1,471,188	16,429,200	257,200	8,545,593
Gambia	1,000	5,000	1,000	0	24,000
Ghana	7,605,000	196,460	2,172,000	0	120,000
Guinea	4,428,640	7,000	713,000	2,600	1,650,800
Guinea-Bissau	730,000	10,000	14,000	22,000	4,641
Haiti	69,799,680	6,000	1,607,200	1,000	346,560
Honduras	9,772,992	0	691,900	19,400	1,810,800
India	0	0	134,494	2,973,600	5,750,000
Indonesia	250,000	0	0	588,850	0
Iraq	0	0	0	0	3,252,000
Kenya	151,368,000	176,556	9,631,025	25,000	4,503,281
Korea Dem Rep	2,592,000	0	51,000	30,000	351,999
Kyrgyz Republic	26,602,800	0	5,600	255,000	482,880
Lao PDR	2,865,600	1,600	605,000	13,000	2,676,480
Lesotho	1,749,200	0	110,000	0	0
Liberia	6,286,945	18,000	0	0	4,860
Madagascar	3,151,400	174,336	2,896,200	0	2,881,680
Malawi	19,956,960	182,744	4,922,400	6,000	125,791
Mali	6,433,920	55,000	168,800	18,000	2,314,375

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EXHIBIT A.2: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2012

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	20,000	0	13,400	0	0
Mongolia	6,073,000	5,120	120,000	0	652,797
Mozambique	98,478,960	30,000	2,490,000	0	6,419,170
Myanmar	9,785,112	0	1,501,600	18,000	6,864,858
Nepal	66,400,720	88,000	237,600	104,600	0
Nicaragua	4,229,280	0	450,400	11,896	822,055
Niger	24,400	3,108	200,600	10,000	740,850
Nigeria	199,399,440	328,212	14,321,300	872,634	3,025,137
Pakistan	252,501,000	70,768	857,600	90,700	226,701
Papua New Guinea	600,000	26,500	800,000	600	6,335
Philippines	2,001,600	1,536	200,000	447,514	14,565,234
Rwanda	15,724,568	20,060	776,400	0	105,000
Sao Tome and Principe	1,682,600	6,100	15,000	5,000	125,400
Senegal	14,407,000	77,056	1,478,400	14,000	1,002
Sierra Leone	1,122,000	0	250,000	15,990	739,073
Solomon Islands	0	0	0	0	0
Somalia	0	2,000	0	0	20,000
South Sudan	2,400,000	5,004	0	0	0
Sri Lanka	0	74,800	250,000	1,800	2,167,010
Sudan	3,335,968	25,040	0	9,000	3,968,200
Tajikistan	1,800,600	0	41,500	140,000	432,480
Tanzania	52,549,408	351,500	4,155,900	47,000	2,105,540
Timor-Leste	2,592,000	5,450	0	2,000	128,571
Togo	43,054,408	26,000	322,400	0	27,000
Uganda	89,421,536	396,829	6,249,200	76,896	114,400
Uzbekistan	3,635,000	0	445,000	800,000	1,121,280
Vietnam	52,546,800	23,976	900,000	800,000	138,999
West Bank and Gaza	0	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	3,801,888	24,000	180,000	95,000	3,443,504
Zambia	39,274,440	38,300	2,010,800	0	1,655,200
Zimbabwe	99,270,000	113,600	634,200	6,050	14,254,948
Other FP2020 Shipment Volumes	15,667,176	721,200	12,500	84,400	68,013,625
Total Volumes	1,860,819,691	5,753,275	109,078,819	9,086,380	330,356,509

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

APPENDIX A

EXHIBIT A.3: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2013

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	23,181,800	0	1,550,000	0	17,001
Bangladesh	10,111,950	0	14,200,000	0	76,298,840
Benin	6,790,800	44,200	32,400	32,000	180,000
Bhutan	295,200	0	0	2,000	126,420
Bolivia	3,457,460	34,500	500,000	70,000	429,840
Burkina Faso	1,411,200	257,196	215,650	28,000	565,200
Burundi	640,833	0	1,000,000	0	574,080
Cambodia	2,160,000	51,399	0	2,000	4,320,008
Cameroon	0	30,300	12,800	57,659	1,494,720
Central African Republic	10,449,800	6,000	183,000	1,500	1,003,797
Chad	1,337,200	44,100	628,400	13,000	2,701,920
Comoros	1,252,800	1,600	93,300	500	48,720
Congo Dem Rep	81,658,344	187,168	1,219,300	118,000	2,384,472
Congo Rep	20,000	800	273,500	500	2,457,988
Cote d'Ivoire	18,607,800	14,000	240,000	2,500	4,584,370
Djibouti	2,288,000	0	7,600	500	8,640
Egypt Arab Rep	100,800	10,801	1,000,164	2,340,100	0
Eritrea	100,000	600	0	0	50,400
Ethiopia	75,766,296	981,740	6,159,396	160,000	15,082,178
Gambia	1,001,800	5,000	110,000	0	253,160
Ghana	34,302,000	144,348	1,025,500	10,000	451,280
Guinea	9,150,400	13,000	0	4,000	0
Guinea-Bissau	1,759,600	21,400	20,600	5,500	42,840
Haiti	51,940,800	1,700	1,646,400	2,000	223,920
Honduras	11,505,600	5,056	670,000	0	1,879,920
India	0	0	18,260	650,800	17,671,399
Indonesia	0	113,500	0	727,409	0
Iraq	0	0	0	0	3,000,000
Kenya	945,600	635,043	12,635,755	1,250	6,269,302
Korea Dem Rep	2,462,400	0	0	15,000	96,000
Kyrgyz Republic	5,299,200	0	15,000	0	570,300
Lao PDR	655,200	0	279,200	5,000	178,962
Lesotho	37,442,000	100	120,000	15,000	238,800
Liberia	17,500,000	15,200	244,800	0	400,320
Madagascar	4,547,768	239,980	5,733,542	0	2,376,836
Malawi	74,791,080	193,048	1,742,327	15,610	1,590,523
Mali	20,041,008	87,700	1,197,198	0	0

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EXHIBIT A.3: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2013

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	12,548,900	5,120	156,700	0	726,480
Mongolia	4,633,152	17,744	80,000	35,000	435,482
Mozambique	30,528,579	127,000	3,072,000	16,000	8,425,200
Myanmar	5,459,032	0	821,000	23,000	10,240,559
Nepal	6,370,788	10,000	655,200	30,000	0
Nicaragua	4,003,200	300	339,000	7,500	1,094,813
Niger	3,394,000	90,016	503,400	0	3,183,760
Nigeria	88,696,740	344,663	2,142,300	0	2,303,072
Pakistan	315,871,100	45,492	9,151,200	200,400	0
Papua New Guinea	19,924,800	38,790	0	4,000	1,313,583
Philippines	0	85,056	1,485,000	0	9,331,385
Rwanda	14,132,000	27,000	928,000	0	1,477,200
Sao Tome and Principe	5,000	500	0	0	6,000
Senegal	10,385,200	0	1,159,000	26,000	0
Sierra Leone	11,122,800	36,600	733,000	18,000	1,652,870
Solomon Islands	0	0	0	500	0
Somalia	0	1,000	0	0	148,700
South Sudan	8,601,000	10,940	0	500	775,200
Sri Lanka	0	93,000	233,500	110,000	2,068,050
Sudan	2,389,600	30,572	0	0	2,456,292
Tajikistan	7,096,200	0	0	105,000	0
Tanzania	29,769,000	309,621	0	55,000	2,009,270
Timor-Leste	57,600	2,100	0	0	225,863
Togo	11,465,520	68,000	606,500	0	108,960
Uganda	185,409,800	471,635	12,243,775	143,000	142,000
Uzbekistan	9,553,400	0	300,000	800,000	1,367,760
Vietnam	31,968,000	56,136	870,000	1,700,000	71,665
West Bank and Gaza	3,998,304	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	6,082,704	56,192	1,126,284	471,459	17,423,472
Zambia	86,409,000	75,000	1,656,900	0	2,669,480
Zimbabwe	111,075,000	244,180	2,460,400	3,500	24,101,441
Other FP2020 Shipment Volumes	54,175,200	678,000	251,400	84,430	46,980,070
Total Volumes	1,588,100,358	6,064,136	93,748,651	8,113,117	288,310,783

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

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EXHIBIT A.4: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2014

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Afghanistan	17,329,040	3,000	109,600	5,500	424,560
Bangladesh	0	0	15,500,000	400,000	88,795,560
Benin	3,993,400	61,300	462,400	50,500	1,011,681
Bhutan	1,440,000	0	0	0	156,150
Bolivia	877,250	27,500	0	0	0
Burkina Faso	12,588,200	298,500	1,476,400	12,900	2,346,480
Burundi	0	207,900	1,500,200	6,860	470,200
Cambodia	2,995,200	30,588	520,000	55,000	4,417,848
Cameroon	10,545,460	69,400	0	2,000	639,339
Central African Republic	200,000	3,500	142,300	0	155,024
Chad	3,738,240	41,100	644,800	0	0
Comoros	0	500	0	0	59,997
Democratic Republic of Congo	163,406,800	50,212	267,600	14,000	964,695
Congo Rep	9,243,540	2,108	21,400	105,000	468,597
Cote d'Ivoire	21,745,600	75,700	1,698,200	15,500	4,770,310
Djibouti	0	0	3,800	0	15,000
Egypt Arab Rep	468,000	140,032	365,000	591,111	0
Eritrea	0	500	20,000	0	108,000
Ethiopia	44,350,736	495,112	12,226,888	430,500	5,894,456
Gambia	1,440,000	9,048	160,000	0	67,860
Ghana	45,105,600	120,696	6,003,800	20,250	2,630,160
Guinea	8,955,000	20,800	45,800	0	194,400
Guinea-Bissau	2,426,400	31,000	25,000	0	8,280
Haiti	57,184,080	0	1,199,200	4,000	0
Honduras	18,254,736	40,000	119,400	21,500	2,860,830
India	0	0	10,094	2,039,273	13,244,150
Indonesia	12,000	0	0	768,575	0
Iraq	5,078,880	0	0	5,039	1,513,029
Kenya	36,198,800	481,336	2,681,620	0	3,617,640
Korea Dem Rep	0	0	0	0	96,000
Kyrgyz Republic	0	0	40,000	0	0
Lao PDR	2,793,456	3,024	382,000	0	1,141,200
Lesotho	44,934,736	600	1,000	0	26,640
Liberia	9,574,000	0	457,000	0	352,080
Madagascar	27,001,200	77,440	8,058,500	0	1,057,362
Malawi	55,827,800	104,324	6,531,650	0	630,006
Mali	32,271,400	100,600	1,190,600	21,000	2,673,306

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EXHIBIT A.4: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2014

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	43,000	1,200	35,000	0	83,520
Mongolia	882,720	0	0	25,000	158,420
Mozambique	44,553,600	22,000	6,868,050	0	129,600
Myanmar	14,708,640	5,000	6,087,300	20,000	13,108,816
Nepal	13,462,400	44,700	3,795,800	35,149	2,558,000
Nicaragua	0	0	95,150	0	0
Niger	504,000	171,024	762,200	3,500	1,918,800
Nigeria	68,370,144	323,168	7,747,600	141,100	920,802
Pakistan	253,485,000	34,080	10,367,600	2,163,550	0
Papua New Guinea	11,238,800	42,000	1,322,400	10,000	1,125,519
Philippines	0	149,023	2,000	0	18,456,458
Rwanda	5,403,000	32,816	1,727,200	0	60,480
Sao Tome and Principe	7,160	0	0	0	39,600
Senegal	30,213,112	33,600	1,149,600	42,000	691,000
Sierra Leone	6,756,880	0	414,600	0	549,360
Solomon Islands	7,000	0	0	0	34,560
Somalia	28,800	28,000	60,000	8,500	68,880
South Sudan	5,205,600	15,000	0	0	24,999
Sri Lanka	0	63,000	406,800	0	6,619,680
Sudan	2,628,000	29,440	6,600	0	1,589,396
Tajikistan	7,438,096	0	43,600	40,000	193,440
Tanzania	31,370,600	458,644	1,492,400	75,000	2,421,591
Timor-Leste	0	10,500	181,400	0	205,359
Togo	7,278,801	48,200	63,000	0	69,104
Uganda	134,701,296	479,202	6,172,050	0	533,130
Uzbekistan	4,809,600	0	0	1,457,500	0
Vietnam	0	43,322	0	0	0
West Bank and Gaza	0	0	0	0	0
Western Sahara	0	0	0	0	0
Yemen Rep	2,367,360	25,088	306,500	48,000	2,338,860
Zambia	54,777,800	136,600	2,532,100	3,500	1,576,800
Zimbabwe	129,833,000	149,100	0	3,000	14,795,070
Other FP2020 Shipment Volumes	47,544,044	1,405,100	390,400	171,201	61,284,336
Total Volumes	1,517,598,007	6,245,627	113,893,602	8,815,508	272,366,420

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

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EXHIBIT A.5: 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	525,600
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	3,559,057
Burundi	5,760,000	134,500	1,639,267	0	594,600
Cambodia	5,730,480	11,000	200,000	30,000	9,551,557
Cameroon	26,245,443	125,052	10,000	46,550	48,465
Central African Republic	0	500	37,900	0	23,841
Chad	100,000	7,600	0	0	0
Comoros	1,303,200	1,008	78,400	0	35,001
Democratic Republic of Congo	65,606,368	308,230	1,189,200	0	3,124,218
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	93,327
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	156,240
Ghana	13,995,000	403,236	1,394,600	0	1,993,464
Guinea	10,080,000	32,500	907,448	0	484,880
Guinea-Bissau	3,384,720	59,400	27,500	0	78,000
Haiti	60,014,400	9,300	421,400	0	228,571
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	3,142,535
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	124,369
Liberia	9,009,780	44,600	846,800	0	459,270
Madagascar	1,500,000	72,722	9,349,250	35,996	595,605
Malawi	68,274,192	278,786	6,099,200	0	552,795
Mali	39,764,195	195,805	432,840	18,393	948,953

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EXHIBIT A.5: 69 FP2020 COUNTRIES CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2015

COUNTRY	CONDOMS MALE & FEMALE	IMPLANTS	INJECTABLES	IUDS	ORALS
Mauritania	0	86,264	41,200	0	140,640
Mongolia	5,752,800	0	90,000	0	242,382
Mozambique	41,712,000	95,000	3,025,500	0	0
Myanmar	42,282,008	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	2,495,670
Nigeria	97,478,368	379,591	8,132,250	75,000	2,725,901
Pakistan	290,853,000	210,484	0	3,024,116	0
Papua New Guinea	3,480	100,800	1,327,200	0	16,399
Philippines	0	731,244	0	82,336	4,135,001
Rwanda	18,626,900	28,752	727,667	5,768	334,166
Sao Tome and Principe	0	0	9,400	0	66,329
Senegal	18,858,530	65,384	760,000	0	1,471,680
Sierra Leone	7,926,120	68,500	726,800	0	1,214,340
Solomon Islands	0	0	15,000	0	0
Somalia	151,200	52,016	158,900	0	262,080
South Sudan	9,036,000	53,100	89,350	0	147,902
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	150,195
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	258,123
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	8,386,917
Zambia	66,167,400	245,900	3,399,400	13,000	3,770,375
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	62,288,739
Total Volumes	1,382,019,149	10,210,602	96,986,050	9,941,385	178,041,824

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

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EXHIBIT A.6: 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	12,403,997	688,089	0	10,000	1,026,756
Congo Rep	3,600,000	1,008	6,720	29,650	2,880
Cote d'Ivoire	16,569,000	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	46,914,000	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	12,488,000	77,000	90,000	0	512,644
Guinea-Bissau	0	50,000	13,000	0	10,080
Haiti	51,351,000	5,300	0	1,500	30,240
Honduras	26,094,600	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	11,262,000	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	12,520,000	33,700	2,475,200	0	0
Mali	12,604,704	27,072	25,000	17,300	20,160

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EXHIBIT A.6: 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	6,796,800	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	32,161,800	98,400	25,400	31,950	228,066
Nicaragua	1,500,000	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	109,244,976	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	17,757,000	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	14,036,128	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	106,975,000	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	1,020,609,956	9,157,327	49,632,930	10,211,412	119,757,814

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

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EXHIBIT A.7: 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	409,840
Bangladesh	1,195,200	400,000	6,258,000	0	0
Benin	14,507,399	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	191,580
Cambodia	1,929,600	40,056	900,000	60,000	7,148,476
Cameroon	6,658,400	95,200	327,000	0	346,560
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	15,913,800	364,828	2,143,580	0	1,689,820
Congo Rep	2,160,000	76,076	32,000	0	720
Cote d'Ivoire	23,494,968	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	72,453,000	1,107,134	7,436,988	440,000	10,794,948
Gambia	5,371,200	16,488	110,000	1,500	269,040
Ghana	0	250,256	106,000	11,500	3,188,280
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	738,504
Honduras	34,884,000	1,440	21,000	0	1,641,840
India	0	0	1,047,488	1,060,550	2,262,311
Indonesia	0	0	0	0	0
Iraq	316,944	0	0	0	40,032
Kenya	373,000	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	719,760
Lesotho	13,713,000	31,200	165,000	0	176,400
Liberia	6,009,000	36,100	319,000	0	5,760
Madagascar	0	250,642	3,012,800	295,019	1,382,880
Malawi	24,783,000	167,408	1,000,000	36,500	236,700
Mali	20,115,816	209,728	293,000	0	217,920

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EXHIBIT A.7: 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	8,488,800	800	0	37,000	350,160
Mozambique	110,406,000	60,016	1,373,600	23,600	4,351,920
Myanmar	35,536,744	18,936	6,108,125	200	14,780,928
Nepal	20,769,000	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	87,040
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	112,500
Senegal	7,005,000	67,864	160,000	0	221,700
Sierra Leone	19,728,000	230,400	332,650	16,000	1,180,840
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	2,143,560
Tajikistan	5,188,200	0	142,000	0	736,320
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	389,200
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	86,619,960	161,800	3,418,650	0	4,564,800
Zimbabwe	96,837,000	60,496	1,399,200	10,000	12,716,941
Other FP2020 Shipment Volumes	9,942,000	1,058,100	5,912,600	230,950	23,403,645
Total Volumes	1,053,032,172	8,245,291	57,685,807	4,546,605	128,481,603

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RHI Shipment Data, September 2018.

APPENDIX B — DATA SOURCES

Prior to the development of market analyses, CHAI reviewed various data sources from partner organizations that provide family planning market data at the global level. CHAI assessed these databases based on available metrics, coverage of countries, frequency of updates, and ease of access to identify the most appropriate sources for sustainable analyses, with the ability to be updated as new data became available. The following provides an overview of the data sources CHAI relied upon for market analyses:

FP2020 Global Markets Visibility Project

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 signed MOUs with six contraceptive manufacturers and received historical shipment data by product and country for each of the 69 FP2020 focus countries. CHAI has partnered with Concept Foundation to collect and aggregate shipment data from participating members of the RHSC Generic Manufacturers for Reproductive Health Caucus (GEMs). 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 14 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 FY2011 through FY2017 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 the developing world for over 40 years. For the purposes of this year's Family Planning Report's Donor Spend Analysis, CHAI worked with UNFPA PSB to determine the value of the contraceptive procurement conducted by UNFPA from 2011 to 2017 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)³⁵

Hosted by UNFPA, RHI collects 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 is updated at variable times that depend on the frequency of data submissions from the data provider. The database aims to capture all of UNFPA's and USAID's contraceptive purchases, MSI's and IPPF's central procurements, and a few other procuring organizations' purchases. For this report, the full RHI data was downloaded in September 2018 and supplemented with data from USAID/ PSM systems to include the USAID-funded shipments not currently captured in RHI due to data integration issues. RHI is primarily used as a comparison for our data set for a high-level understanding of the supplier shipment data coverage.

35. RHI, available at <https://www.unfpa.org/rhi-home>

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

The value of the FP2020 public sector market was constructed using the best 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 of the cumulative shipment volumes from 2011 to 2017 in every category with the exception of IUDs and emergency oral contraceptives, where suppliers held 51 percent and 58 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. Because CHAI has not yet received male condom data from any suppliers, RHI data was relied upon for the male condom volumes. 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

METHOD	PARTICIPATING SUPPLIER VOLUMES IN RHI 2011 – 2017	ALL SUPPLIER VOLUMES IN RHI 2011 – 2017	% OF TOTAL METHOD VOLUMES
Condoms - Female	149 M	151 M	99%
Implants	38 M	39 M	99%
Injectables	398 M	410 M	97%
IUDs	14 M	28 M	51%
Orals - Combined & Progestin Only	702 M	714 M	98%
Orals - Emergency	10 M	17 M	58%
Total	1.31 B	1.36 B	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

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

The following section describes the data source and market size estimation in more detail.

Historical Supplier-Reported Data

To date, the Global Markets Visibility Project has collected historical supplier-reported shipment data from 14 manufacturers – Bayer, Cipla, CR Zizhu, Cupid, Female Health Company, Helm AG, Mylan, Merck (MSD), Pfizer, Pregna, PT Tungal, Shanghai Dahua, SMB, and Techno Drugs. Collectively, the total volumes cover institutional sales (USAID, UNFPA, SMOs, etc.) and MOH tenders across five family planning product categories.³⁶

Suppliers have cumulatively shipped 150.6 million female condoms, 48.8 million implants, 594.3 million injectables, 61.0 million IUDs, 1.6 billion orals (combined & progestin only), and 42.7 million emergency oral contraceptives from 2011 to 2017.

It is important to note that there were several shipments to procurer (USAID, UNFPA, SMOs) warehouses in non-FP2020 countries, such as Belgium, Denmark, France, Germany, Netherlands, Norway, Sweden, Switzerland, UK, and USA. Although these volumes were shipped to non-FP2020 countries, the end shipment destination of these volumes would likely be 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	•		•		
Mylan			•	•	•
Merck (MSD)		•			•
Pfizer			•		
Pregna				•	
PT Tungal			•		•
Shanghai Dahua		•			
SMB				•	
Techno Drugs			•		•

EXHIBIT C.4: SUPPLIER-REPORTED SHIPMENT VOLUMES TO FP2020 COUNTRIES BY METHOD, 2011–2017

METHOD	2011	2012	2013	2014	2015	2016	2017	CUMULATIVE 2011-2017
Condoms – Female	20.0 M	18.9 M	17.4 M	25.1 M	25.3 M	22.0 M	22.1 M	150.6 M
Implants	3.1 M	5.8 M	6.1 M	6.2 M	10.2 M	9.2 M	8.2 M	48.8 M
Injectables	73.3 M	109.1 M	93.7 M	113.9 M	97.0 M	49.6 M	57.7 M	594.3 M
IUDs	10.3 M	9.1 M	8.1 M	8.8 M	9.9 M	10.2 M	4.5 M	61.0 M
Orals - Combined & Progestin Only	311.0 M	319.5 M	283.4 M	267.5 M	171.6 M	113.7 M	122.0 M	1.6 B
Orals - Emergency	3.0 M	10.9 M	4.9 M	4.9 M	6.5 M	6.1 M	6.5 M	42.7 M

Source: [Exhibit C.4]: [1] Historical Supplier-Reported Shipment Data

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

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

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 captures a subset of procurers who choose to submit historical procurement data. Further, although some countries report national procurements, most national procurements are not reported in the RHI database.

The total historical supplier-reported shipment volumes to 69 FP2020 countries and procurer warehouses are consistently greater than RHI volumes across four family planning methods: implants, injectables, IUDs, and orals.³⁷ Thus, for these product markets, the supplier-reported shipment data captures a more comprehensive view of the family planning market in the 69 FP2020 countries. For female condoms, the RHI volumes are actually greater than supplier shipment data in 2013 and 2014. However, the difference was relatively small in 2014, and aggregate 2011-2017 volumes for female condoms are higher in supplier shipment data compared to RHI.

EXHIBIT C.5: SUPPLIER-REPORTED SHIPMENT VOLUMES AS A PERCENTAGE OF RHI REPORTED* VOLUMES BY METHOD, 2011-2017

METHOD	2011	2012	2013	2014	2015	2016	2017	AVERAGE 2011-2017
Condoms – Female	100%	105%	63%	95%	113%	122%	122%	103%
Implants	174%	142%	100%	122%	123%	145%	118%	132%
Injectables	127%	159%	137%	145%	184%	130%	126%	144%
IUDs	235%	168%	134%	222%	383%	296%	191%	233%
Orals - Combined & Progestin Only	242%	254%	206%	239%	193%	170%	226%	219%
Orals - Emergency	102%	187%	432%	270%	357%	433%	352%	305%

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

Source: [1] Historical Supplier Shipment Data; [2] RHI Shipment Data, September 2018.

37. Similar to the historical supplier-reported shipment totals, RHI volumes to Belgium, Denmark, Germany, France, Netherlands, Norway, Sweden, Switzerland, UK, and the USA are included in the total. For the UK, shipments to IPPF or MSI warehouses are included in total volumes. For Belgium, Denmark, Germany, France, Netherlands, Norway, Sweden, Switzerland, UK, and the USA, shipments funded or procured by USAID and UNFPA are included in total volumes. We assume the end shipments destination of these volumes are likely to the 69 FP2020 countries and thus, include the volumes in the total FP2020 market estimate.

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

Male Condom Market

Because CHAI has not yet received data from male condom suppliers, 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. We used RHI shipment volume data from 2011 to 2017 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.³⁸ The male condom market reflected by the RHI data includes 23 manufacturers and 17 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 2011 to 2017.

EXHIBIT C.6: RHI MALE CONDOM SHIPMENT VOLUMES, 2011–2017

METHOD	2011	2012	2013	2014	2015	2016	2017
Condoms – Male	1.62 B	1.84 B	1.57 B	1.49 B	1.36 B	1.00B	1.03B

EXHIBIT C.7: 69 FP2020 CONTRACEPTIVE MARKET VOLUMES BY METHOD, 2011–2017

METHOD	2011	2012	2013	2014	2015	2016	2017
Condoms – Female	20.0 M	18.9 M	17.4 M	25.1 M	25.3 M	22.0 M	22.1 M
Condoms – Male (RHI)	1623.1 M	1842.0 M	1570.7 M	1492.5 M	1356.8 M	998.6 M	1030.9 M
Implants	3.1 M	5.8 M	6.1 M	6.2 M	10.2 M	9.2 M	8.2 M
Injectables	73.3 M	109.1 M	93.7 M	113.9 M	97.0 M	49.6 M	57.7 M
IUDs	10.3 M	9.1 M	8.1 M	8.8 M	9.9 M	10.2 M	4.5 M
Orals – Combined & Progestin Only	311.0 M	319.5 M	283.4 M	267.5 M	171.6 M	113.7 M	122.0 M
Orals – Emergency	3.0 M	10.9 M	4.9 M	4.9 M	6.5 M	6.1 M	6.5 M

Source: [Exhibit C.6] RHI Shipment Data, September 2018. Source: [Exhibit C.7] Historical Supplier-Reported Shipment Data; RHI Shipment Data, September 2018.

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

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

Total FP2020 Public Sector Market In Terms of CYPs

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

CHAI divided all shipment volumes by the corresponding CYP factor published by USAID. CYP is the estimated protection provided by contraceptive methods during a one-year period based upon the volume of all methods sold or distributed for free to clients during that period of time.³⁹ 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 users.

EXHIBIT C.8: VOLUMES TO CYPs SHIPPED CONVERSION FACTORS, 2011–2017	
METHOD	UNITS PER 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
Injectables - 2 month	6
Injectables - 3 month	4
IUDs	0.22
Orals - Combined	15.00
Orals - Progestin Only	15.00
Orals - Emergency	20.00

Source: [1] USAID, "Couple-Years of Protection (CYP)," May 2017.

39. USAID, "Couple-Years of Protection (CYP)", April 2014, available at <http://www.usaid.gov/what-we-do/global-health/family-planning/couple-years-protection-cyp>.

APPENDIX C — ESTIMATING THE TOTAL FP2020 PUBLIC SECTOR MARKET SIZE

Value of the Total FP2020 Public Sector Market

The total value of contraceptives was calculated by applying average unit prices to total shipment volumes. Average unit prices by method and year are based on the average price between USAID and UNFPA as reported in UNFPA's Contraceptive Price Indicator. Although there are different prices for different products and markets, we estimate implied spend using UNFPA's Contraceptive Price Indicator prices for simplicity.⁴⁰ Finally, the Implant Access Program price of \$8.50 was applied to

implant volumes from 2013 to 2017. 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 RHI reported volumes. As a result, numbers may differ from the RHI reported value field.

EXHIBIT C.9: AVERAGE UNIT PRICE

Method	PRICE RANGE		2011	2012	2013	2014	2015 ⁴¹	2016 ⁴²	2017 ⁴³
	Minimum	Maximum	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
Condoms - Female	\$0.46	\$0.56	\$0.56	\$0.55	\$0.54	\$0.53	\$0.52	\$0.49	\$0.46
Condoms - Male	\$0.02	\$0.03	\$0.03	\$0.03	\$0.03	\$0.03	\$0.03	\$0.03	\$0.02
Implants	\$8.50	\$18.65	\$18.65	\$17.98	\$8.50	\$8.50	\$8.50	\$8.50	\$8.50
Injectables	\$0.79	\$0.83	\$0.82	\$0.82	\$0.83	\$0.81	\$0.81	\$0.82	\$0.79
IUDs	\$0.43	\$0.48	\$0.43	\$0.43	\$0.43	\$0.48	\$0.47	\$0.46	\$0.47
Orals - Combined	\$0.26	\$0.31	\$0.31	\$0.30	\$0.28	\$0.30	\$0.28	\$0.26	\$0.27
Orals - Progestin Only	\$0.31	\$0.33	\$0.32	\$0.32	\$0.31	\$0.31	\$0.32	\$0.33	\$0.32
Orals - Emergency	\$0.26	\$0.49	\$0.34	\$0.49	\$0.44	\$0.30	\$0.37	\$0.35	\$0.26

Notes: [1] For 2013-2017 implants, the Implant Access Program price is used; [2] The price range and unit prices in each year are based on an average of USAID and UNFPA prices via UNFPA's Contraceptive Price Indicators

Sources: [1] UNFPA Contraceptive Price Indicator, 2011–2017; [2] IAP Implant Prices.

40. UNFPA, "UNFPA Contraceptive Price Indicator –Year 2017", available at https://www.unfpa.org/sites/default/files/resource-pdf/CYP_Report_Public.pdf, "UNFPA Contraceptive Price Indicator - Year 2016" available at <http://www.unfpa.org/resources/contraceptive-price-indicator-2016>, "UNFPA Contraceptive Price Indicator - Year 2015" available at https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptive_Price_Indicators.pdf, "UNFPA Contraceptive Price Indicator –Year 2014," available at <http://www.unfpa.org/resources/contraceptive-price-indicator-2014>, "UNFPA Contraceptive Price Indicators – 2013," available at <http://www.unfpa.org/sites/default/files/resource-pdf/UNFPA%20Contraceptive%20Price%20Indicators%20-%202013.pdf>, "UNFPA Contraceptive Price Indicators – 2012," available at <http://www.unfpa.org/sites/default/files/resource-pdf/UNFPA%20Contraceptive%20Price%20Indicators%20-%202012.pdf>, "UNFPA Contraceptive Price Indicators – 2011

41. The 2015 unit pricing is an average of UNFPA 2015 prices and USAID 2014 prices as USAID 2015 prices were unavailable.

42. The 2016 unit pricing is UNFPA 2016 price only as USAID 2016 pricing is unavailable, with the exception of IUDs where the average of USAID 2014 price and UNFPA 2016 price was taken to avoid significant fluctuations.

43. The 2017 unit pricing is UNFPA 2017 price only as USAID 2017 pricing is unavailable, with the exception of IUDs where the average of USAID 2014 price and UNFPA 2017 price was taken to avoid significant fluctuations.

APPENDIX D – ESTIMATING TOTAL FP2020 DONOR-SPEND

To protect customer confidentiality, suppliers were not asked to disclose customer information associated with shipment volumes. In previous reports, CHAI relied upon RHI to estimate the donor-funded volumes and in turn, CYPs and costs; however, for this report, CHAI has had the opportunity to work directly with USAID, GHSC-PSM, and UNFPA to improve visibility into the 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

CHAI historically conducted supplementary research and analysis using publicly available sources of data in three large markets: Bangladesh, India, and Indonesia⁴⁴. In this report, the analysis is refreshed with the latest data for Bangladesh and India; government procurement tenders historically made available through the National Family Planning Coordinating Body (BKKBN) for Indonesia were not available for 2017 tenders.

Due to the limitations of these data sources, CHAI cannot confirm that they represent comprehensive coverage of the public sector markets in these countries. Rather, the data is meant to be used as initial confirmation of local and regional procurement in these markets that are not covered by the suppliers participating in this report.

44. Bangladesh, India, and Indonesia were countries that accounted for the largest proportion of the gap between FP2020-reported users on product-based methods and users implied by the shipment data based on country-specific comparisons

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

Bangladesh

The Bangladesh Ministry of Health and Family Welfare (MOHFW) procured 3 million CYPs for the 2017 calendar year, as compared to 8 million CYPs for the 2016 calendar year. Procurement contracts for product-based contraceptives were awarded primarily to regional and local suppliers, including (but not limited to): HLL Lifecare Limited, MSD/Organon (India) Pvt Ltd.⁴⁵, MSD B.V.⁴⁶, M/S, Reneta Ltd., Popular Pharmaceuticals Ltd., and Techno Drugs from Bangladesh. Only the data from a subset of these manufacturers is included in the current calculation of the value derived from the supplier shipment data⁴⁷. By applying the same prices (Exhibit C.9) used for 2017 supplier shipment volumes to the volumes from the Bangladesh MOHFW procurement data, we estimated the implied value from those contracts to be \$8 mil-

lion for 2017, as compared to the \$8 million implied by the 2017 supplier shipment data⁴⁸.

In addition, a review of Bangladesh's supply chain reports revealed that consumption of contraceptive commodities has been fairly consistent, between 12 to 14 million CYPs from 2011 to 2017, and that the lower 2017 procurement levels did correspond to a decrease in year-end stock levels and was not necessarily a result of lower consumption.

CHAI used data from the Government of Bangladesh's Ministry of Health and Family Welfare (MOHFW)⁴⁹ for 2015, 2016, and 2017.⁵⁰

EXHIBIT E.1: MOHFW SUPPLY CHAIN CONTRACEPTIVE SHIPMENT RECEIPT DETAILS

PRODUCT NAME	SUPPLIER NAME	2015	2016	2017
CONDOM	ESSENTIAL DRUGS CO. LTD.	50,000,000	68,850,000	-
CONDOM	KHULNA ESSENTIAL LATEX PLANT((KELP)	100,000,000	35,000,000	-
CONDOM	UNFPA	-	-	1,195,200
ECP (2 TAB/PACK)	M/S, RENETA LTD.	100,000	100,000	-
IMPLANT (2 ROD)	SOCIAL MARKETING COMPANY (SMC)	-	17,000	35,000
IMPLANT (SINGLE ROD)	JAMES INTERNATIONAL	-	5	2,880
IMPLANT (SINGLE ROD)	Merck Sharp & Dohme B.V.(MSD B.V.).	-	150,000	3,000
IMPLANT (SINGLE ROD)	MSD-NV Organon, Organon(India) Private Ltd.	50,000	-	199,980
INJECTABLES (DMPA IM) ⁵¹	Helm-AG	14,000,000	-	-
INJECTABLES (DMPA IM) ⁵¹	TECHNO DRUGS Ltd	2,500,000	8,100,000	5,000,000
INJECTABLES (DMPA IM) ⁵¹	UNFPA	-	-	299,997
INJECTABLES (DMPA IM) ⁵¹	USAID	-	-	1,000,000
INJECTABLES (DMPA IM) ⁵¹	Popular Pharmaceuticals Ltd.	-	-	1,000,000
IUD (CT-380A)	SARBAN INTERNATIONAL LTD.	400,000	-	-
IUD (CT-380A)	SOCIAL MARKETING COMPANY (SMC)	73,679	-	-
IUD (CT-380A)	Marie Stopes Clinic	-	-	65,000
ORAL CONTRACEPTIVE PILL (SHUKHI)	HLL Lifecare Limited	22,469,025	-	-
ORAL CONTRACEPTIVE PILL (SHUKHI)	M/S, RENETA LTD.	20,730,975	54,750,000	-
ORAL CONTRACEPTIVE PILL (SHUKHI)	Maneesh Pharmaceuticals Limited	22,289,280	-	-
ORAL CONTRACEPTIVE PILL (SHUKHI)	Popular Pharmaceuticals Ltd.	10,800,000	14,250,000	-
ORAL CONTRACEPTIVE PILL (SHUKHI)	TECHNO DRUGS Ltd	1,710,720	-	-
ORAL PILL APON	M/S, RENETA LTD.	1,000,000	3,500,000	750,000

Source: Bangladesh MOHFW, Supply Chain Management Portal, 2018.

45. MSD/Organon (India) Pvt Ltd. is a Merck (MSD) company and therefore not a regional or local supplier.

46. MSD B.V. is a Merck (MSD) company and therefore not a regional or local supplier.

47. Manufacturers participating in this report include Merck (MSD) from the Netherlands, and Techno Drugs from Bangladesh

48. Despite the implied value being similar from the two data sources, the supplier shipment volumes indicate different method mix and volumes by method than the MOHFW procurement data; in other words, the supplier shipment volumes provide greater coverage in some methods and gaps in others when compared to the MOHFW procurement data.

49. 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>

50. The fiscal year for Bangladesh runs from July 1 to June 30, but for the purposes of this analysis, CHAI summed up the monthly data by calendar year for 2017.

51. The product name was changed from "Injectables (Depo-Provera)" to "Injectables (DMPA IM)" in this report to accurately reflect the generic name of the product.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

India

Based on India's Ministry of Health and Family Welfare (MOHFW)⁵² Annual Report for the 2016/2017 fiscal year⁵³, which ends on March 31, CYPs from procured products-based methods⁵⁴ totaled 35 million, compared to 41 million in the 2015/2016 fiscal year. These two additional years of data represent a decline from the 54 million CYPs in the 2010/2011 fiscal year and is primarily driven by a decline in IUDs, condoms⁵⁵, and orals. However, the MOHFW report states that the consumption of IUDs has remained steady, and that focused efforts on spacing will likely increase uptake of IUDs in the future. Sterilizations remained steady at four million performed for both the 2015/2016 and 2016/2017 fiscal years.

While the MOHFW annual report shipment volumes are based on the 2015/2016 and 2016/2017 fiscal years instead of the calendar year used in this report, by applying the same prices (Exhibit C.9) used for 2015,

2016, and 2017 supplier shipment volumes, we estimate that implied value from the annual reports is approximately \$57 million in 2015/2016 fiscal year and \$45 million in the 2016/2017 fiscal year, as compared to the \$1 million to \$2 million implied by the 2015, 2016, and 2017 supplier shipment data⁵⁶.

While the MOHFW Annual Reports do not record who the awarded suppliers are, a report from USAID has identified local suppliers and the contraceptives they supply to the government and SMO programs as of 2006, including Indian Drug and Pharmaceutical Ltd. (IDPL), HLL Lifecare Limited, Phaarmasia, Pregna International, SMB Corporation, Cipla, Win-Medicare, and Famy Care, which is now Mylan.

EXHIBIT E.2: ANNUAL REPORT OF DEPARTMENT OF HEALTH & FAMILY WELFARE FOR THE YEAR OF 2015-16 (INCLUDES FULL FISCAL YEARS 2013-14 TO 2014-15)

EXHIBIT E.2.1: QUANTITIES SUPPLIED TO STATES/UTS				
CONTRACEPTIVES	2013-14	2014-15	2015-16	2016-17
Condoms (In million pieces)	394	350.9	394.0	432.8
Oral Pills (In lakh cycles)	361.24	551.32	361.2	312.0
IUDs (In lakh pieces)	60.42	88.244	60.4	48.1
Tubal Rings (In lakh pairs)	19	27.145	19.0	6.4
ECP(in lakh packs)	75.8	75.8	75.8	60.8
Centchroman Contraceptive Pill (Lakh Strips)				7.1
Pregnancy Test Kits (in lakhs)	100.14	122.4	100.1	124.6

EXHIBIT E.2.2: PERFORMANCE OF SOCIAL MARKETING PROGRAMME IN THE SALE OF CONTRACEPTIVE				
CONTRACEPTIVES	2013-14	2014-15	2015-16	2016-17
Condoms (Million pieces)	698.33	683.93	482.2	399.0
Oral Pills (Social Marketing) (lakh cycles)	290.27	276.44	152.8	194.3
SAHELI (in Lakh tablets)	279.35	314.6	311.2	321.8

*Figures are Provisional

EXHIBIT E.2.3: EMERGENCY CONTRACEPTIVE PILLS [ECP]				
ITEM	2013-14	2014-15	2015-16	2016-17
ECP	75.80	75.80	86.1	-

Source: India MOHFW Annual Report, 2015-2016, 2016-2017, 2017-2018.

52. Government of India, Ministry of Health and Family Welfare, "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", "Annual Report of Department of Health & Family Welfare for the year of 2014-15", "Annual Report of Department of Health & Family Welfare for the year of 2013-14" available at: <http://www.mohfw.nic.in/documents/publications>

53. The fiscal year for India runs from April 1 to March 31, as such 2017/2018 figures were not included in this analysis as the reported data is not a full fiscal year.

54. Only modern contraceptive methods from India's MOHFW reports including male condoms, IUDs, orals, and emergency oral contraception are included in this analysis.

55. Condoms are reported in millions whereas all other methods are reported as "lakh" – the Indian unit of 100,000

56. The latest reports from India referenced are from the 2015/2016 and 2016/2017 fiscal years and thus are compared to the corresponding supplier shipment data from 2015, 2016, and 2017.

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

EXHIBIT E.3 ANNUAL REPORT OF DEPARTMENT OF HEALTH & FAMILY WELFARE FOR THE YEAR OF 2013-14 (INCLUDES FULL FISCAL YEARS 2010-11 TO 2012-13)

EXHIBIT E.3.1: QUANTITIES SUPPLIED TO STATES/UTS				
CONTRACEPTIVES	2010-11	2011-12	2012-13	2013-14 (UP TO SEPT. 2013)
Condoms (In million pieces)	290.137	295.000	367.866	234.271
Oral Pills (In lakh cycles)	237.998	298.135	226.793	205.573
IUDs (In lakh pieces)	90.000	73.500	87.508	34.005
Tubal Rings (In lakh pairs)	34.534	30.359	31.22	18.274
ECP (in lakh packs)	21.540	18.300	75.919	14.098
Pregnancy Test Kits (in lakhs)	211.74	21174	222.186	0.00

EXHIBIT E.3.2: QUANTITIES SUPPLIED TO STATES/UTS				
CONTRACEPTIVES	2010-11	2011-12	2012-13	2013-14 (UP TO SEPT. 2013)
Condoms (Million pieces)	581.44	677.91	618.18	315.19
Oral Pills (Social Marketing) (lakh cycles)	358.08	471.975	376.82	124.79
SAHELI Weekly Oral Pill (in lakh tablet)	234.31904	244.56	270.76	0.042*

*Figures are Provisional

EXHIBIT E.3.3: EMERGENCY CONTRACEPTIVE PILLS [ECP]				
ITEM	2010-11	2011-12	2012-13	2013-14 (UP TO SEPT. 2013)*
ECP	21.54	18.30	75.919	14.098

*Figures are Provisional

EXHIBIT E.4: LOCAL MANUFACTURERS & THEIR PRODUCTS IN INDIA*	
METHOD	SUPPLIER NAME
Condoms	HLL Lifecare Limited
Injectables	HLL Lifecare Limited Famy Care (Mylan)
IUDs	Pregna International SMB Corporation Famy Care (Mylan)
Orals	Indian Drug and Pharmaceutical Ltd. (IDPL) HLL Lifecare Limited Phaarmasia Famy Care (Mylan) Win-Medicare Cipla

* USAID, "Assessment of India's locally manufactured contraceptive product supply", 2006, available at:
http://pdf.usaid.gov/pdf_docs/Pnadf989.pdf

APPENDIX E – ADDITIONAL MARKETS VISIBILITY

Indonesia

As per the 2017 Family Planning Market Report, data from public tender documents published by the National Family Planning Coordinating Body (BKKBN)⁵⁷ indicates an increase in CYPs procured from product-based methods⁵⁸, from 17 million in 2015⁵⁹ to 23 million in 2016⁶⁰. By applying the same prices (Exhibit C.9) used for the 2015 and 2016 supplier shipment volumes, we estimate that the total implied value from these tender documents is \$57 million in 2015 and \$75 million in 2016, as compared to the less than \$1 million and \$3 million implied by the 2015 and 2016 supplier shipment data.

The data also shows that the Indonesian procurement contracts were awarded primarily to regional and local suppliers, including: PT Catur Dakwah Crane Farmasi, PT Harsen Laboratories, PT Kimia Farma, PT Triyasa Nagamas Farma, PT Pratapa Nirmala, PT Sunthi Sepuri, and PT Tunggal⁶¹. Among them, PT Tunggal is the only supplier currently participating in this report, as part of the GEMs Caucus⁶².

EXHIBIT E.5: MULTIPLE TENDER WINNER ANNOUNCEMENTS

YEAR	PRODUCT	DISTRIBUTOR	QUANTITY
2015	Combination Pills	PT Indofarma Global Medika	11,776,656
2015	Combination Pills	PT Perintis Bina Utama Farmasi	15,114,124
2015	Combination Pills	PT Kimia Farma Trading & Distribution	4,042,768
2015	3-month Injectables	PT Indofarma Global Medika	13,019,861
2015	3-month Injectables	PT Trijaya Medika Farma	12,950,506
2015	3-month Injectables	PT Trijaya Medika Farma	13,067,747
2015	3-month Injectables	PT Trijaya Medika Farma	13,497,338
2015	2-rod implants w/ inserters	PT Djaja Bima Agung	164,710
2015	2-rod implants w/ inserters	PT Djaja Bima Agung	166,270
2015	2-rod implants w/ inserters	PT Djaja Bima Agung	192,793
2015	2-rod implants w/ inserters	PT Djaja Bima Agung	172,010

EXHIBIT E.6: MULTIPLE TENDER WINNER ANNOUNCEMENTS

YEAR	PRODUCT	DISTRIBUTOR	QUANTITY
2016	Combination Pills	PT Harsen Laboratories	11,648,300
2016	Combination Pills	PT Kimia Farma	17,626,000
2016	Combination Pills	PT Pratapa Nirmala	8,793,200
2016	Combination Pills	PT Sunthi Sepuri	8,829,100
2016	Combination Pills	PT Triyasa Nagamas Farma	17,540,300
2016	3-month Injectables	PT Catur Dakwah Crane Farmasi	7,289,160
2016	3-month Injectables	PT Harsen Laboratories	21,895,860
2016	3-month Injectables	PT Triyasa Nagamas Farma	14,474,540
2016	3-month Injectables	PT Tunggal Idaman Abadi	7,348,980
2016	2-rod implants w/ inserters	PT Catur Dakwah Crane Farmasi	633,680
2016	2-rod implants w/ inserters	PT Harsen Laboratories	633,660
2016	2-rod implants w/ inserters	PT Triyasa Nagamas Farma	633,660

Sources: [Exhibit E.5] BKKBN Tender Documents, 2015. [Exhibit E.6] BKKBN Tender Documents, 2016.

57. Family Planning and Reproductive Health Unit, National Family Planning Coordinating Body (BKKBN)

58. Procured methods from Indonesia's MOHFW reports include implants, injectables and orals.

59. Tender Winner Announcement documents accessed June 2017 at <http://lpse.bkkbn.go.id/eproc/>

60. Tender Winner Announcement documents accessed June 2017 at https://e-katalog.lkpp.go.id/backend/katalog/list_produk/63

61. The 2016 tender documents indicate the manufacturer; however, the 2015 documents refer only to distributors.

62. The Generic Manufacturers Caucus for Reproductive Health (GEMs Caucus) comprises generic pharmaceutical manufacturers throughout Asia, Africa, and Europe, united in their commitment to provide safe, quality-assured family planning products that enable women to make choices about their reproductive health; available at <https://www.rhsupplies.org/activities-resources/groups/generic-manufacturers-caucus/>.

APPENDIX G – 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 average prices of UNFPA and USAID for the 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.

APPENDIX H – 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
LAM	LACTATIONAL AMENORRHEA METHOD
LARC	LONG-ACTING REVERSIBLE CONTRACEPTIVES
MOH	MINISTRY OF HEALTH
MOHFW	MINISTRY OF HEALTH AND FAMILY WELFARE
RHSC	REPRODUCTIVE HEALTH SUPPLIES COALITION
RHI	REPRODUCTIVE HEALTH INTERCHANGE
SMO	SOCIAL MARKETING ORGANIZATION
USAID	UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT
UNFPA	UNITED NATIONS POPULATION FUND