

# 计划生育市场报告

---

2022年12月

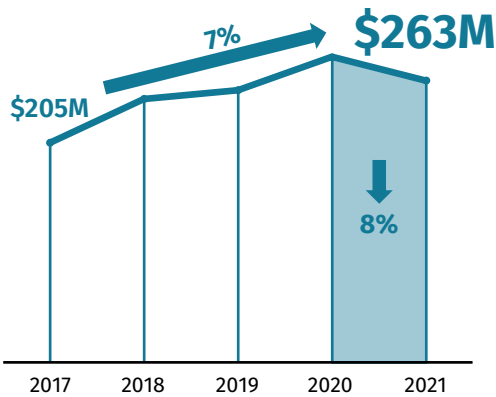


2021年计划生育态势	3
供应商发货分析	4
全球采购方支出分析	15
与主要利益相关者讨论的要点	18
GLOBAL MARKETS VISIBILITY PROJECT ACKNOWLEDGEMENTS	19
APPENDICES	21
ACKNOWLEDGEMENTS	49

# 2021年计划生育态势

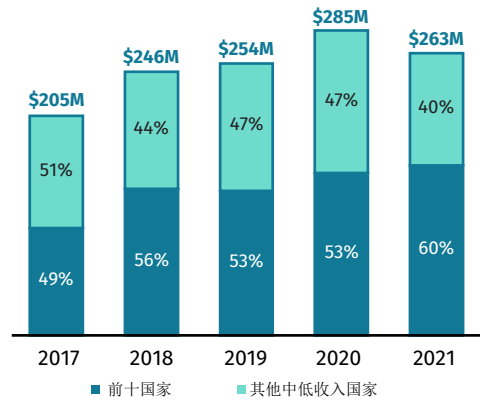
## 市场趋势显著

公共部门市场总值  
相较于2020年有收缩，但从2017年至2021年市场总值有7%的增长。



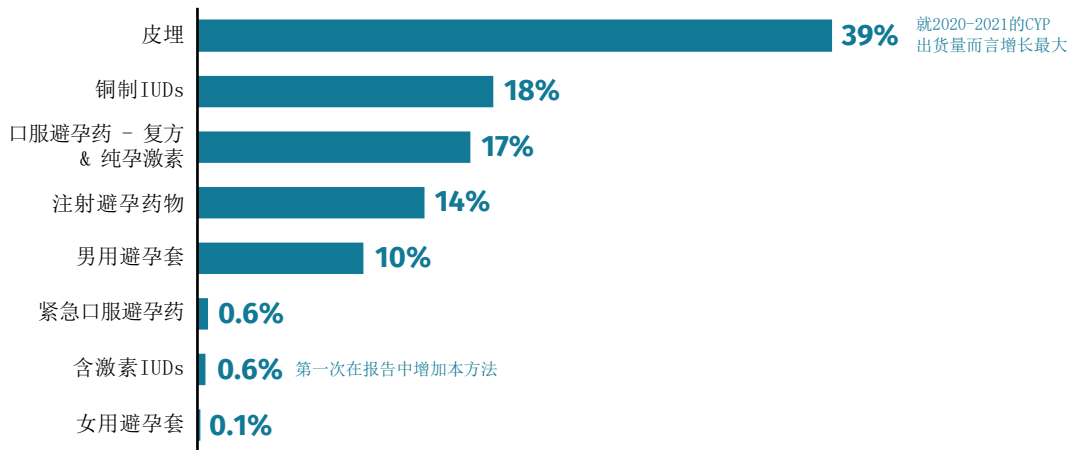
公共部门市场最大的前十个国家所占份额

\*本图中前十的国家以2021年的数据为依据，按字母顺序排列为：孟加拉、布基纳法索、刚果民主共和国、埃塞俄比亚、马拉维、莫桑比克、尼日利亚、坦桑尼亚、乌干达和赞比亚。



## 对各种方法进行分

基于2021年CYP出货量的各种避孕方法市场份额



## 全球采购方支出分析

# \$108M



UNFPA在2021财年的避孕药具采购总支出比2020财年减少了34%。

主要原因是受新冠疫情影响，2021年英国外交、联邦和发展事务部（FCDO）对UNFPA的资金大幅减少。

# \$35M



USAID在2021财年的避孕药具采购总支出比2020财年减少了24%。

在2017财年至2021财年的典型波动范围内。

# 供应商发货分析

2022 年《计划生育市场报告》(Family Planning Market Report) 介绍了 2017 年至 2021 年 83 个中低收入国家 (Lower Middle Income Country, LMIC)<sup>1</sup> 公共部门避孕市场概况。此前的市场报告侧重于 69 个 FP2020 重点国家, 而今年的报告在地理范围上做出了更新, 涵盖了 83 个中低收入国家, 地理范围进一步扩大, 这些国家现已纳入 FP2030 于 2021 年宣布的性与生殖健康 (Sexual And Reproductive Health, SRH) 社区新型全球伙伴关系与衡量架构中。

本报告范围内的公共部门数量是指由公共部门采购方采购的数量, 如美国国际开发署 (United States Agency for International Development, USAID) 和联合国人口基金 (United Nations Population Fund, UNFPA) 以及 83 个中低收入国家的卫生部、政府关联采购方及社会营销组织 (Social Marketing Organization, SMO)。《计划生育市场报告》根据供应商报告的历史发货数据, 分析了所有基于产品的现代避孕方法的采购趋势。该发货数据采集自 17 家供应商, 避孕方法涵盖女用避孕套、皮埋、避孕注射剂、宫内节育器 (Intrauterine Device, IUD) (含铜及激素)<sup>2</sup>、口服避孕药 (复方及纯孕激素) 以及紧急口服避孕药。男用避孕套的分析结果基于生殖健康用品可视化系统 (Reproductive Health Supplies Visualizer, RH Viz) 中的发货数据。<sup>3</sup> 发货数据提供了对避孕产品历史采购情况的深入洞察, 但这并不一定等同于对避孕产品的实际需求, 因为采购行为是由可用资金及产能等关键因素所决定的。

2021 年, 公共部门市场价值相对于 2020 年下降了 8%, 但仍高于 2017-2019 年的水平。相对于 2020 年, 2021 年的市场容量也下降了 15%。由于方法特定的趋势, 从 2020 年至 2021 年, 发运至公共部门市场的避孕产品的夫妻避孕年 (Couple Years of Protection, CYP)<sup>4</sup> 也下降了 13%。

从 2020 年到 2021 年, 公共部门市场在已出货 CYP 方面的缩减主要是由铜制 IUD、避孕注射剂以及复方和纯孕激素口服避孕药的数量减少所导致的。与 2017-2020 年期间一样, 长效可逆避孕方法 (Long-Acting Reversible Methods of Contraception-LARC), 包括皮埋、铜制 IUD 和激素型 IUD 仍然是 2021 年公共部门市场已出货 CYP 的主要贡献者。虽然从 2020 年至 2021 年 LARC 在已出货 CYP 中的总体份额保持在 58% 不变, 但 LARC 内各子类别的数据却有所变化: 从 2020 年至 2021 年, 皮埋和激素型 IUD 的已出货 CYP 份额有所增加; 与此同时, 铜制 IUD 的已出货 CYP 份额有所下降。

1 这 83 个中低收入国家按照截至 2020 年的世界银行收入分类进行定义。有关 FP2030 将报告数据的中低收入国家的更多信息, 请参见: [https://fp2030.org/sites/default/files/Data-Hub/FP2030\\_DataReport\\_v5.pdf](https://fp2030.org/sites/default/files/Data-Hub/FP2030_DataReport_v5.pdf)。请注意, FP2030 报告涵盖 82 个中等收入国家, 比《计划生育市场报告》涵盖的 83 个国家少一个。在一定程度上, 由于难以获取数据, FP2030 目前未报告西撒哈拉 (之前是 69 个 FP2020 重点国家之一) 的相关数据。然而, 在与 FP2030 协商后, CHAI 和 RHSC 将西撒哈拉纳入了《计划生育市场报告》的范围内, 因此共涵盖 83 个中低收入国家。为确保国家范围在报告所涵盖的所有年份中保持一致, 从供应商处收集了 2017-2021 年 83 个范围内国家的历史发货数据。

2 IUD 是宫内节育器的缩写。由于公开的激素型 IUD 价格于 2021 年首次纳入 UNFPA 避孕价格指数, 因此激素型 IUD 今年首次被纳入《计划生育市场报告》。

3 此报告长期以来使用生殖健康交流中心 (Reproductive Health Interchange, RHI) 的数据来估计男用避孕套市场的规模。由于男用避孕套市场相当分散, RHI 长期以来针对该避孕方法提供了较高的可见性。此外, RHI 数据也一直用于评估《计划生育市场报告》所涵盖的所有避孕方法的相对可见性。然而, 2020 年 9 月, SRH 社区从 RHI 平台转移到了生殖健康用品可视化系统 (RH Viz)。因此, 2022 年《计划生育市场报告》现采用 RH Viz 数据进行男用避孕套数量及市场可见性计算。有关详细信息, 请参见附录 C。

4 夫妻避孕年 (CYP) 是指避孕方法在一年内提供的估计避孕效果 (例如, 120 只避孕套可为一对夫妻提供一年的避孕效果)。对于所有 CYP 计算, 此报告均采用 USAID 最近发表的 CYP 因子。有关详细信息, 请参见附录 C。

本节分析了 2017 年至 2021 年公共部门市场的发货量、价值（美元）和已出货 CYP 总量趋势。



### 值得注意的市场趋势

以美元计，公共部门市场总值从 2020 年的 2.85 亿美元收缩至 2021 年的 2.63 亿美元，但仍高于 2017-2019 年的水平。由于所采购的避孕用品组合发生变化，已出货 CYP 数据也在 2020 年至 2021 年期间有所下降。

83 个中低收入国家的公共部门避孕市场总值从 2017 年的 2.05 亿美元<sup>5</sup> 增加到 2021 年的 2.63 亿美元（附件 1）。虽然在 2017 年至 2020 年间市值每年都在增长，但在 2020 年达到峰值后，市值从 2.85 亿美元下降到 2021 年的 2.63 亿美元，下降了 8%。然而，2021 年的 2.63 亿美元市值仍高于 2017 年至 2019 年的年度市值（附件 1）。

从 2020 年到 2021 年，已出货 CYP 的数据也有所下降，从 2020 年的 1.18 亿下降到 2021 年的 1.03 亿（附件 3）。CYP 下降了 13%，这主要是由于铜制 IUD 数量减少，这种产品成本相对较低，但 CYP 因子却相对较高。从 2020 年到 2021 年，铜制 IUD 的已出货 CYP 下降了 900 万。从 2020 年至 2021 年，避孕注射剂（已出货 CYP 下降 600 万）以及复方和纯孕激素口服避孕药（已出货 CYP 下降 200 万）的已出货 CYP 同样有所下降。

从 2020 年至 2021 年，皮埋的已出货 CYP 也稍有下降（下降 40 万），但从历史数据来看，皮埋的已出货 CYP 始终保持上升趋势。但男用避孕套（增加 200 万）和激素型 IUD（增加 50 万）的已出货 CYP 有所增加，部分抵消了这一下降势头。

就 2017 年至 2021 年间的地区趋势而言，撒哈拉以南非洲地区的市场份额基本保持不变，从 2017 年 56% 的低位上升至 2019 年 65% 的高位（附件 7）。2020 年至 2021 年，亚太地区的市场份额增加了 4 个百分点，达到 28%，但在 2017-2021 年期间，该地区的市场份额保持相对恒定，早在 2017 年便已达到过 28% 的高位（附件 7）。在本报告所涉及的公共部门市场中，<sup>6</sup> 10 个最大的国家（就市值而言）占 2021 年整体市值的 50% 以上，其中孟加拉国<sup>7</sup>

约占公共部门市场份额的 19%（附件 8、9）。尽管相对于 2020 年，2021 年公共部门整体市值有所收缩，但 10 个最大国家的市值从 2020 年的 1.51 亿美元增加到了 2021 年的 1.59 亿美元（附件 9）。虽然排名前十的市场名单逐年变化，但从 2017 年至 2021 年，孟加拉国、埃塞俄比亚、尼日利亚、坦桑尼亚和乌干达这五个国家每年都高居排名前十的市场中。



### 值得注意的避孕手段趋势

从 2020 年到 2021 年，市值方面的缩减主要是由避孕注射剂以及复方和纯孕激素口服避孕药的数量减少所导致的。相比于 2020 年，2021 年的已出货 CYP 也有所下降，这是由 2021 年复方和纯孕激素口服避孕药、铜制 IUD 和避孕注射剂的数量减少所导致的。与前几年相比，2021 年激素型 IUD 的已出货 CYP 显著增加。

2021 年，铜制 IUD 的数量连续第三年下降，与 2020 年相比下降了 33%（附件 2）。具体而言，铜制 IUD 的采购量从 2020 年的 600 万件下降至 2021 年的 400 万件（附件 2）。减少的数量与 2021 年整体市值（下降 50 万美

元）的小幅下降相当，这是因为铜制 IUD 的单位成本相对较低（附件 1、4）。但由于每件铜制 IUD 的 CYP 因子相对较高，铜制 IUD 数量的减少对已出货 CYP 产生了重大影响，导致铜制 IUD 的已出货 CYP 在 2020 年至 2021 年期间下降了 900 万（附件 3、4）。

从 2020 年至 2021 年，尼日利亚、印度尼西亚、肯尼亚和乌兹别克斯坦等国家是导致铜制 IUD 市场下降的主要贡献者。其中一些国家在前一至两年采购了明显更多的铜制 IUD，表明 2021 年铜制 IUD 数量的下降可能部分与采购周期有关。<sup>8</sup>

5 除非另有说明，否则报告的币种为美元

6 私营部门避孕用品的使用并未计入这些市场份额数据。此外，一些从孟加拉国和印度等市场的国内供应商处采购的产品可能未包含在参与供应商的发货数据中。因此，还应注意的，市场份额估计值仅基于参与供应商的可用发货数据。有关孟加拉国和印度市场的更多详细信息，请参见附录 E。

7 如前所述，《计划生育市场报告》基于参与供应商的数据，介绍了孟加拉国的避孕用品采购趋势概况。但是，除《计划生育市场报告》中记录的参与供应商外，孟加拉国市场上还活跃着其他供应商（有关更多详细信息，请参见附录 E）。

8 由于铜制 IUD 的保质期较长（约 3-7 年）且避孕周期也较长（放置后最长可达 12 年），其采购周期可能并非总是与 FP 报告的年度时间表一致。各国可能会在一年内采购大量铜制 IUD，并在接下来的数年内不再采购。

从 2020 年至 2021 年，激素型 IUD 类别有所增加。具体而言，随着准备好采取这种方法的 国家开始引入这种方法并扩大使用规模，激素型 IUD 的已出货 CYP 从 2020 年的 10 万增加到 2021 年的 60 万。<sup>9</sup>

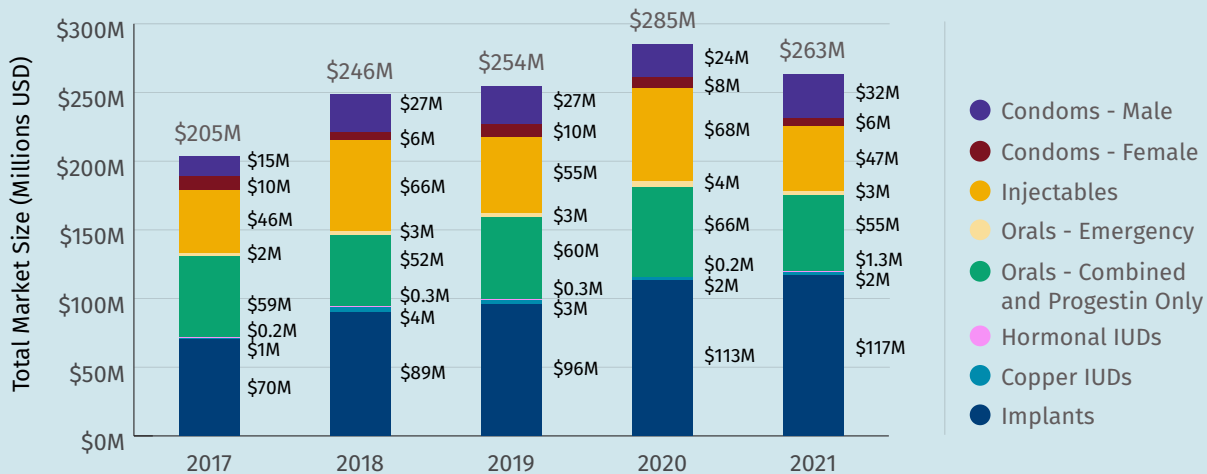
在 2020 年达到 6800 万美元的高位后，避孕注射剂的市值在 2020 年至 2021 年下降了 31%，达到 4700 万美元（附件 1）。从 2020 年至 2021 年，避孕注射剂的发货量也从 8500 万支降至 5800 万支（附件 2）。在 2020 年至 2021 年的避孕注射剂总体下降量中，孟加拉国的下降量约占 40%。孟加拉国在 2020 年采购了明显更多的避孕注射剂，因此 2021 年孟加拉国避孕注射剂采购量的下降可能是采购周期以及新冠疫情所致。供应及资金中断导致了避孕注射剂市场遭到干扰，这可能也是促使这一数据在 2021 年有所下降的原因。

复方和纯孕激素口服避孕药的市值从 2020 年的 6600 万美元下降到 2021 年的 5500 万美元，下降了 16%（附件 1）。口服避孕药的发货量也从 2020 年的 2.83 亿下降到 2021 年的 2.57 亿（附件 2）。多个国家的口服避孕药采购量有所下降，其中津巴布韦最为突出。导致上述结果的潜在驱动因素包括正常的采购周期波动，以及过去几年中因供应链挑战而导致的运输相关困难。据报告，这些因素导致部分国家口服避孕药到货延迟，从而影响了口服避孕药的后续发货量和发货时间。

注：虽然采购周期波动和上述其他因素促成了 2020 年至 2021 年的市场趋势，但形成 2021 年市场格局的另一个值得注意的因素是可用的避孕用品采购资金减少。这一驱动因素将在后续的“全球采购方支出分析”章节中进一步阐述。

9 激素型 IUD 引进工作得到了激素型 IUD 获取小组的支持，该小组是一个由政府、出资方、制造商、采购机构（UNFPA 和 USAID/GHSC-PSM）、研究人员和服务提供伙伴组成的全球合作联盟，旨在通过确保提供价格合理、质量有保证的产品来促进市场可持续发展，同时为准备引进该方法及扩大其使用规模的国家（例如，政府对该方法表现出浓厚兴趣、制定引进计划等）提供支持，从而扩大中低收入国家获得激素型 IUD 的机会。有关更多信息，请参见激素型 IUD 获取机会门户网站（<https://www.hormonaliud.org/>）。

### Exhibit 1: Value of the public-sector market (USD)



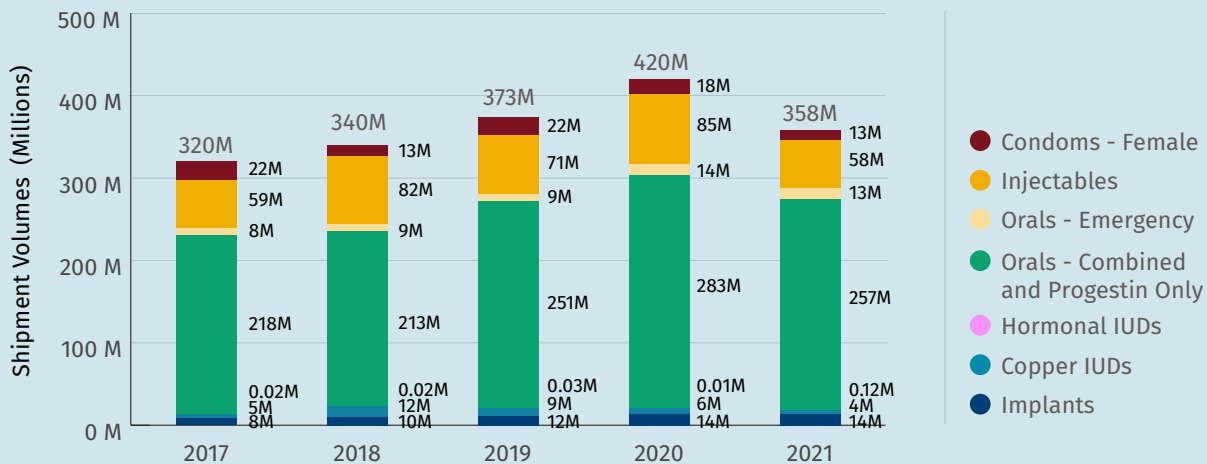
Method	Year over year 2020-2021*	Compound annual growth rate 2017-2021**
Condoms- Male	33%	21%
Condoms- Female	-29%	-14%
Injectables	-31%	0.3%
Orals- Emergency	-7%	12%
Orals- Combined & Progestin Only	-16%	-2%
Hormonal IUDs	785%	55%
Copper IUDs	-22%	4%
Implants	4%	14%
<b>Total</b>	<b>-8%</b>	<b>7%</b>

\*Year over year (YOY): change in the value of the public-sector market between 2020-21  
 \*\*Compound Annual Growth Rate (CAGR): [(final value/beginning value)^(1/number of years)]-1

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Additionally, year over year and compound annual growth rate numbers are calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2022; [3] UNFPA Contraceptive Price Indicator, 2017-2021

### Exhibit 2: Total public-sector market volumes (male condoms excluded\*)



Method	Year over year 2020-2021	Compound annual growth rate 2017-2021
Condoms- Female	-31%	-13%
Injectables	-32%	-0.3%
Orals- Emergency	-4%	12%
Orals- Combined & Progestin Only	-9%	4%
Hormonal IUDs	785%	55%
Copper IUDs	-33%	-4%
Implants	-1%	13%
<b>Total</b>	<b>-15%</b>	<b>3%</b>

Male condom shipment values (billions)						
2017	2018	2019	2020	2021	Year over year 2020-2021	Compound annual growth rate 2017-2021
0.65B	1.21B	1.17B	1.04B	1.28B	23%	18%

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

Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Additionally, year over year and compound annual growth rate numbers are calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2022.



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



Method	Year over year 2020-2021	Compound annual growth rate 2017-2021
Condoms- Male	23%	18%
Condoms- Female	-31%	-13%
Injectables	-30%	0%
Orals- Emergency	-4%	12%
Orals- Combined & Progestin Only	-10%	4%
Hormonal IUDs	785%	55%
Copper IUDs	-33%	-4%
Implants	-1%	12%
<b>Total</b>	<b>-13%</b>	<b>5%</b>

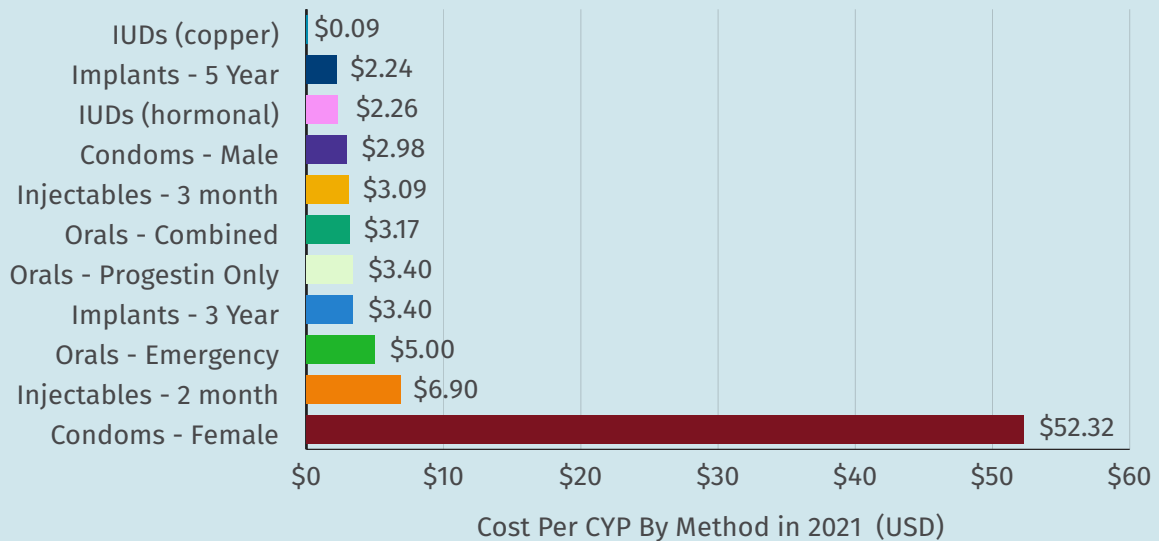
Note: The sum of individual stacked bars for all exhibits may differ slightly from totals due to rounding. Additionally, year over year and compound annual growth rate numbers were calculated throughout the report using actual values, not the rounded values in the chart. Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2022; [3] USAID, "Couple-Years of Protection (CYP)".

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

Method	Units per CYP	Unit Cost					Cost per CYP				
		2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Condoms - Female	120.00	\$0.46	\$0.47	\$0.44	\$0.43	\$0.44	\$55.32	\$56.88	\$53.28	\$51.48	\$52.32
Condoms - Male	120.00	\$0.02	\$0.02	\$0.02	\$0.02	\$0.02	\$2.71	\$2.64	\$2.72	\$2.75	\$2.98
Injectables - 1 month	13.00	\$0.85	\$0.85	N/A	N/A	N/A	\$11.05	\$11.05	N/A	N/A	N/A
Injectables - 2 month	6.00	\$1.15	\$1.15	\$1.15	\$1.15	\$1.15	\$6.90	\$6.90	\$6.90	\$6.90	\$6.90
Injectables - 3 month	4.00	\$0.77	\$0.79	\$0.75	\$0.77	\$0.77	\$3.09	\$3.16	\$3.00	\$3.07	\$3.09
Orals - Combined	15.00	\$0.27	\$0.24	\$0.23	\$0.23	\$0.21	\$4.01	\$3.56	\$3.51	\$3.38	\$3.17
Orals - Progestin Only	12.00	\$0.32	\$0.29	\$0.29	\$0.30	\$0.28	\$3.80	\$3.52	\$3.47	\$3.60	\$3.40
Orals - Emergency	20.00	\$0.26	\$0.28	\$0.40	\$0.26	\$0.25	\$5.14	\$5.52	\$7.98	\$5.18	\$5.00
Implants - 3 Year	0.40	\$8.50	\$8.50	\$8.50	\$8.50	\$8.50	\$3.40	\$3.40	\$3.40	\$3.40	\$3.40
Implants - 5 Year	0.26	\$8.50	\$8.50	\$8.50	\$8.50	\$8.50	\$2.24	\$2.24	\$2.24	\$2.24	\$2.24
IUDs (hormonal)	0.21	N/A	N/A	N/A	N/A	\$10.84	N/A	N/A	N/A	N/A	\$2.26
IUDs (copper)	0.22	\$0.31	\$0.30	\$0.31	\$0.37	\$0.43	\$0.07	\$0.07	\$0.07	\$0.08	\$0.09

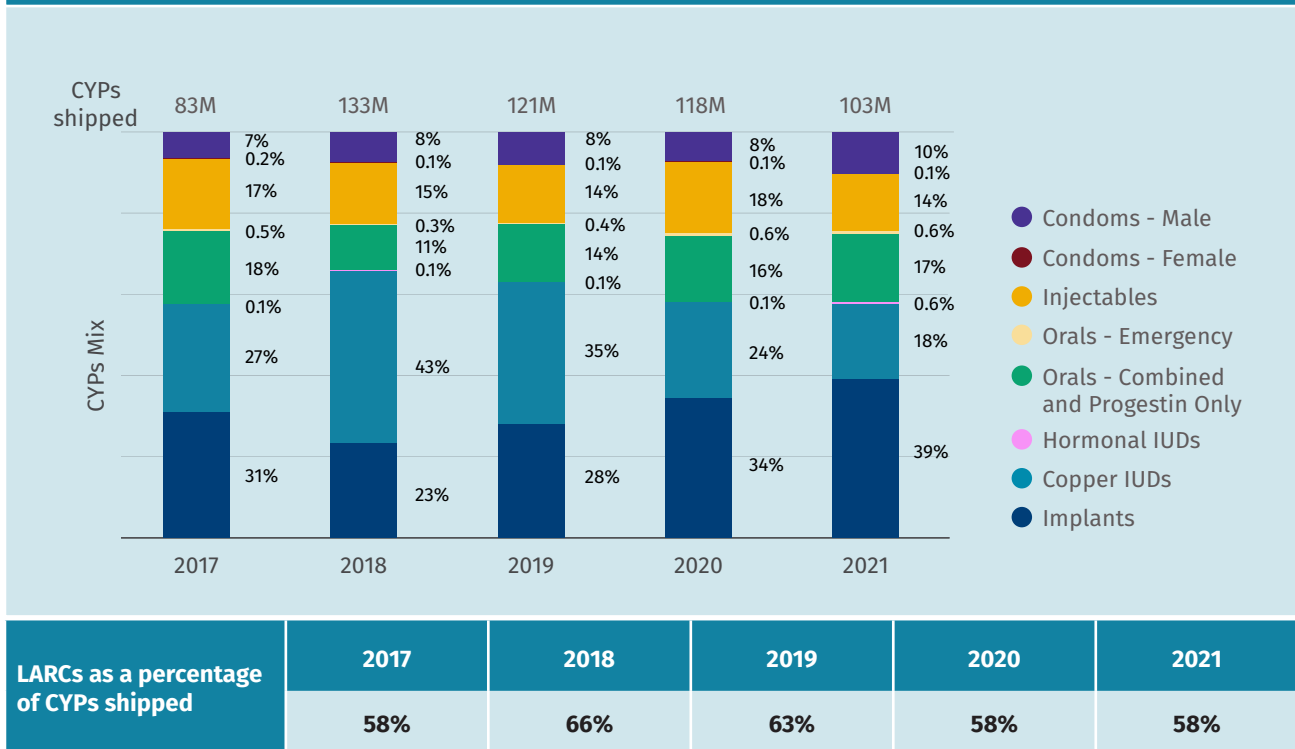
### Exhibit 4B: Cost per CYP by method in 2021 (USD)



Note: N/A indicates method was not listed on the UNFPA Contraceptive Price Indicator. Implant pricing in this exhibit uses the IAP implant price. 2021 is the first year that UNFPA Contraceptive Price Indicator has listed separate prices for the 3-year and 5-year implants, but to maintain historical consistency, we continue to use the \$8.50 IAP implant price for this illustrative cost per CYP calculation.

Sources: [1] UNFPA Contraceptive Price Indicator, 2017-2021; [2] USAID, "Couple-Years of Protection (CYP)", [3] IAP Implant Price.

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

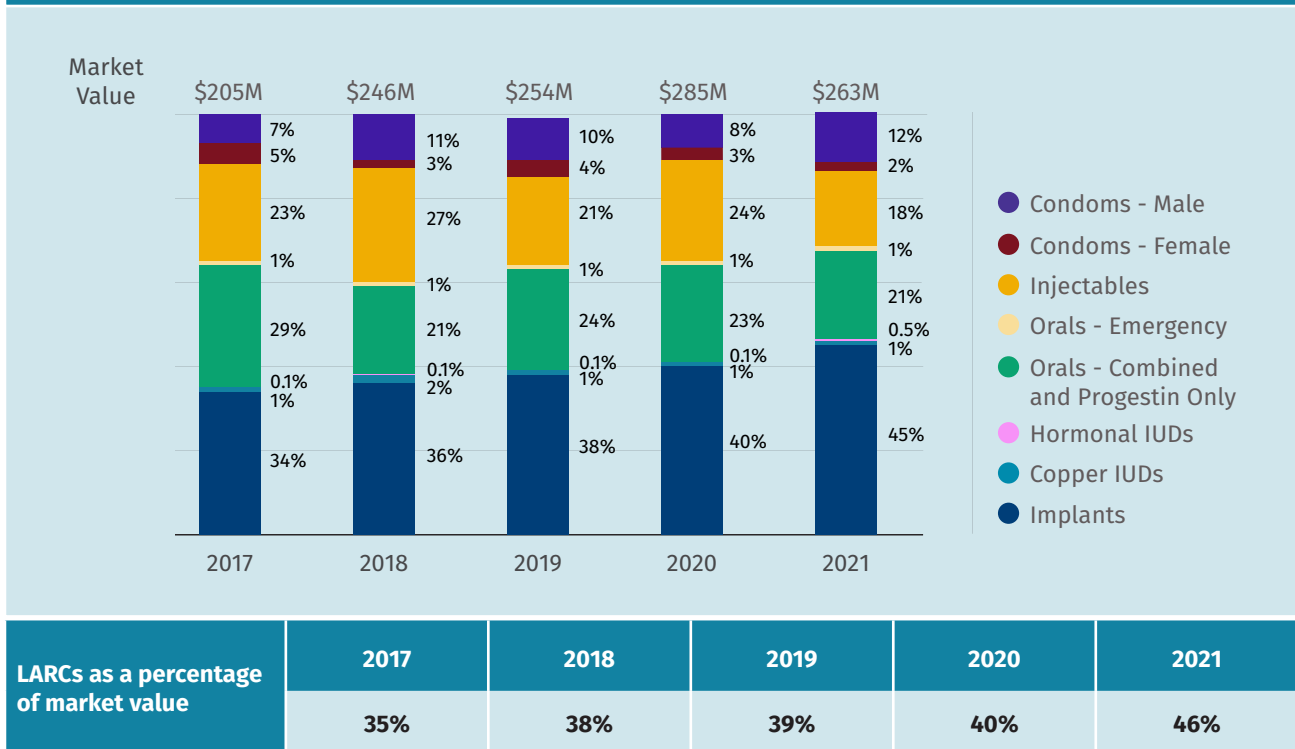


Note: Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

LARCs as a percentage of CYPs shipped were calculated using actual values, not the rounded values in the chart.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2022; [3] UNFPA Contraceptive Price Indicator, 2017-2021; [4] USAID, "Couple-Years of Protection (CYP)".

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

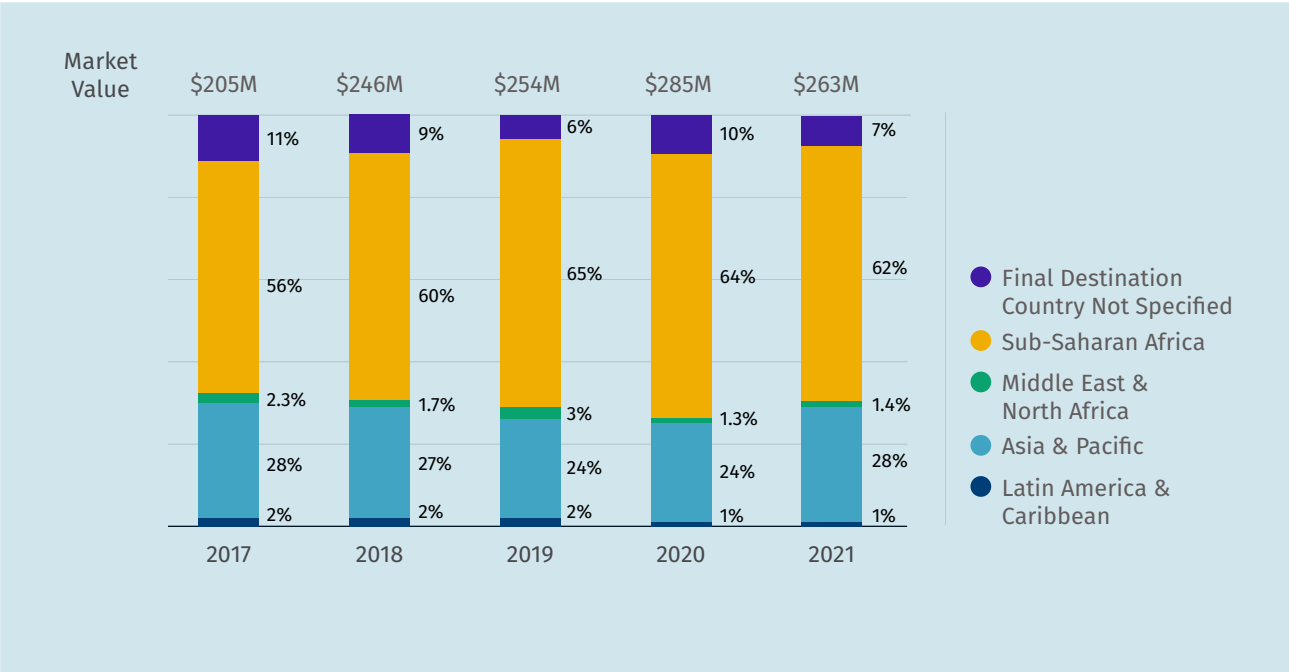


Note: Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

LARCs as a percentage of market value were calculated using actual values, not the rounded values in the chart.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz shipment data, retrieved August 2022; [3] UNFPA Contraceptive Price Indicator, 2017-2021.

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



Note: Public-sector, regional market share shown in the graph above is influenced by the relative distribution of LMICs, the majority of which are located in Sub-Saharan Africa. Only a small number of countries from both the Latin America & Caribbean and Middle East & North Africa regions are included among the 83 LMICs; trends across the whole of these regions are not captured above.

“Destination country not specified” indicates that shipments were received in warehouses for later distribution to LMICs. Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), different supplier scope, as well as some supplier or RH Viz revisions to historical data, based on updated information.

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2022; [3] UNFPA Contraceptive Price Indicator, 2017–2021

Exhibit 8: Top ten countries in terms of value, 2021

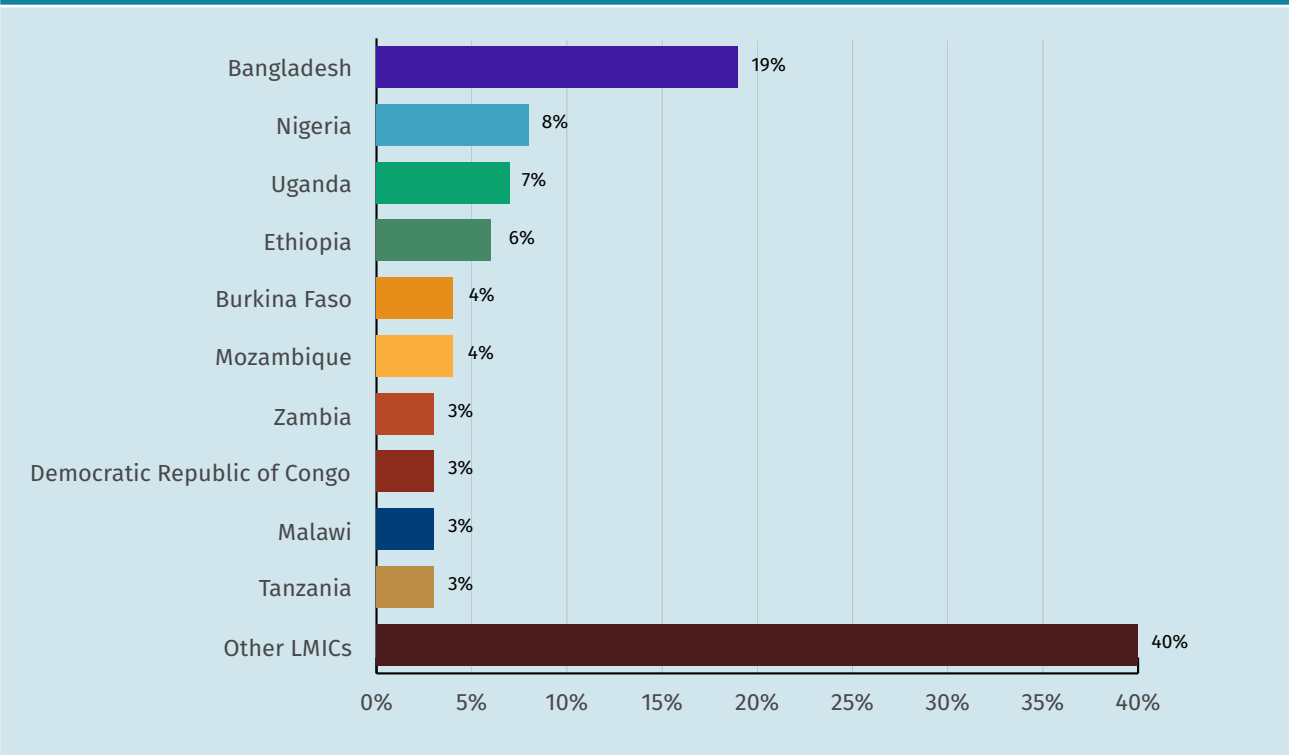
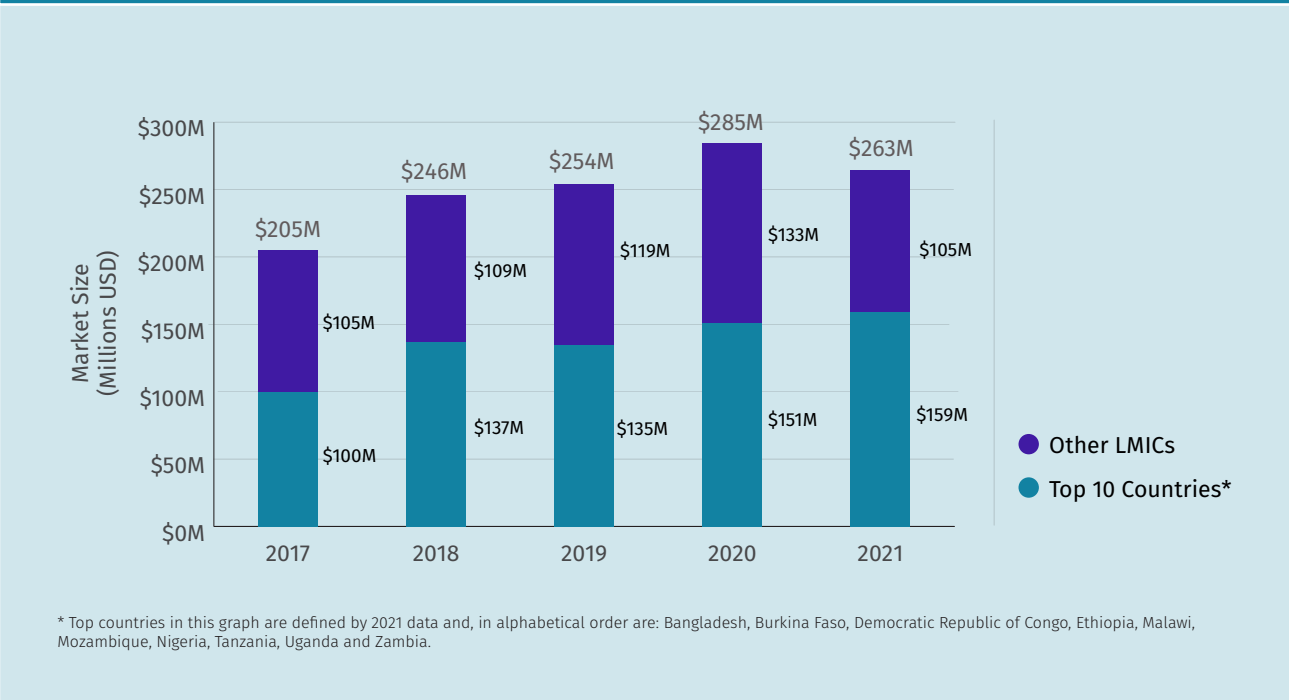


Exhibit 9: Value of 10 largest public-sector countries compared to value of all other countries combined



Note: Some differences exist in the historical data for 2017-2020 in this version of the report versus previous versions due to the different geographic scope of the report this year (83 LMICs) v. last year (69 FP2020 focus countries), the transition from RHI to RH Viz for male condom data, as well as a few supplier-reported revisions to historical data, based on updated information.

Sources: [1] Historical supplier-reported shipment data; [2] RH Viz Shipment Data, retrieved August 2022; [3] UNFPA Contraceptive Price Indicator, 2017-2021.

# 全球采购方支出分析

本节重点介绍来自 UNFPA 采购事务处及 USAID “避孕用品与避孕套发货概述” (Overview of Contraceptive and Condom Shipments) 报告中的数据<sup>10</sup>，以便了解这两个主要的全球采购方在 83 个中低收入国家公共部门市场的历史避孕用品采购支出情况。

在 2017–2021 期间，UNFPA 在避孕用品方面的支出于 2020 财年达到顶峰，随后在 2021 财年大幅下降。从 2020 财年至 2021 财年，USAID 的支出也有所下降，但仍保持在从 2017–2021 五年周期内观察到的典型波动范围内。

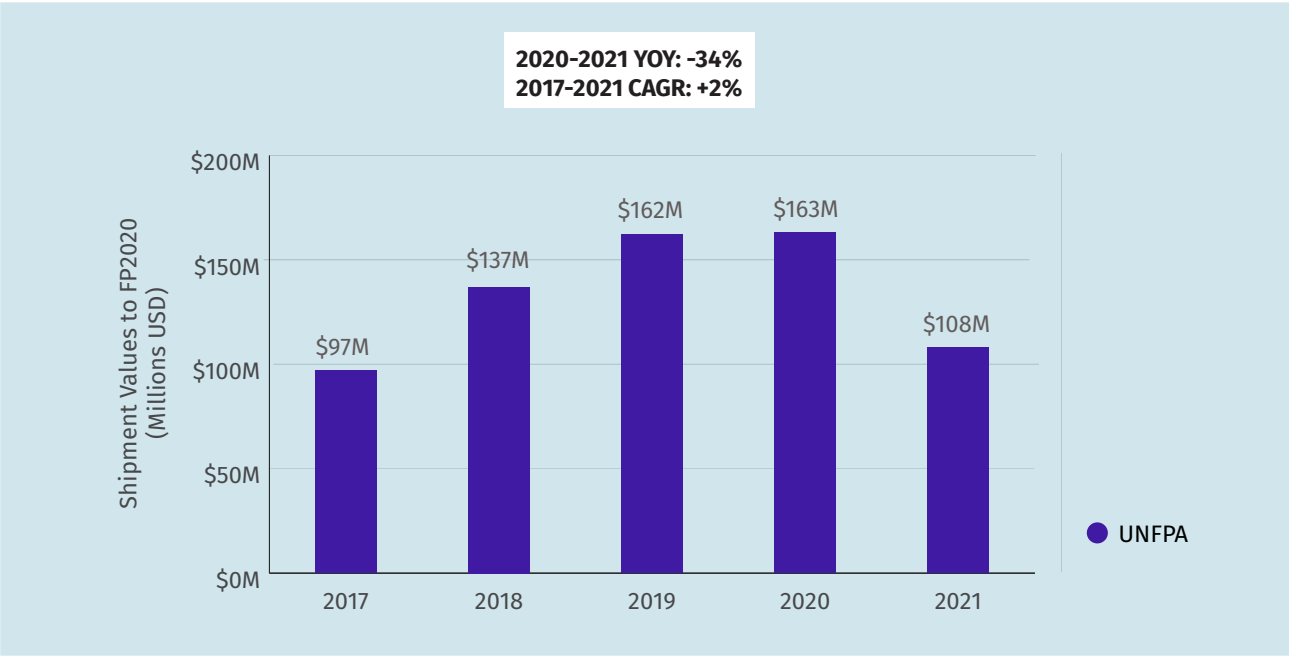
UNFPA 在避孕用品采购方面的支出总额（包括 UNFPA 项目采购和第三方采购）从 2020 财年的 1.63 亿美元下降至 2021 财年的 1.08 亿美元，下降了 34%（附件 10）。<sup>11</sup> 然而，在 2021 财年，UNFPA 在避孕用品采购方面的支出仍高于 2017 年 9700 万美元的五年周期低位（附件 10）。UNFPA 在 2021 财年的避孕用品采购支出之所以有所下降，是因为 UNFPA 当年的供资情况发生了重大变化。特别是，由于新冠疫情所带来的经济挑战，英国宣布在 2021 年大幅度削减其对官方国际发展援助项目（Official Development Activities - ODA）的供资，其中包括将其对 UNFPA 物资供应项目的供资削减约 85%。<sup>12</sup> 其他政府（如法国和美国）<sup>13</sup>、基金会和私人捐助者的确在减轻资金削减所带来的影响方面有所帮助；然而，这些捐款不足以满足所有项目需求，也不足以完全弥补 2021 年的资金缺口。<sup>14</sup>

虽然从 2020 财年到 2021 财年，UNFPA 在避孕用品采购方面在整体支出大幅下降，但第三方采购占 UNFPA 支出总额的百分比从 2020 财年的 9% 增加到了 2021 财年的 20%。具体而言，从 2020 财年至 2021 财年，第三方采购增加了约 700 万美元（增长 50%），而项目采购减少了约 6200 万美元（下降 42%）。在 2017 财年至 2021 财年期间，第三方采购占 UNFPA 年度中低收入国家总支出的百分比每年都在 10% 至 20% 之间波动。

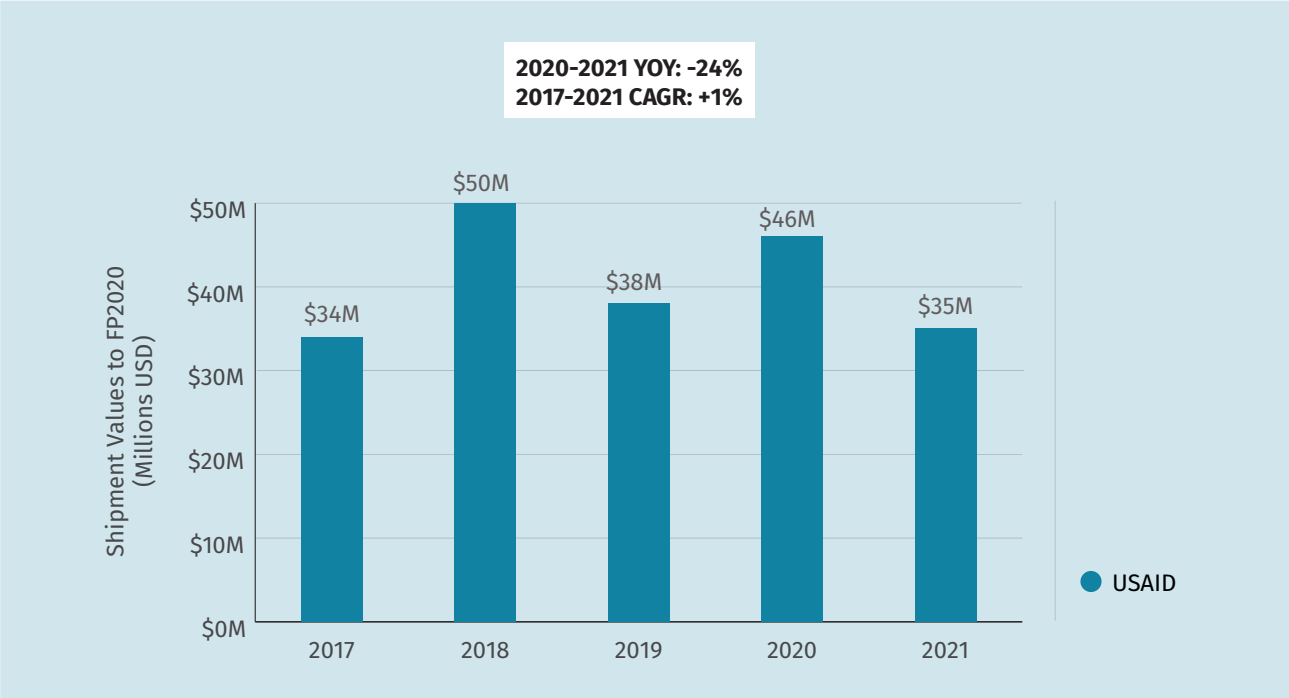
对于 USAID，2021 财年（不包括男用和女用避孕套）<sup>15</sup> 的避孕用品采购年值为 3500 万美元，较 2020 财年下降了 24%（附件 11）。<sup>16</sup> 从 2017 财年至 2021 财年，USAID 支出每年在 3400 万美元至 5000 万美元之间波动。USAID 在 2021 财年的支出在此范围内。2021 年 USAID《避孕用品与避孕套发货概述》报告强调了导致 2020 财年至 2021 财年下降趋势的几个关键驱动因素，包括国家资金来源的变化（例如，某些国家转变为增加国内筹资）、采购周期引起的波动以及新冠疫情。USAID 在避孕用品采购方面的支出仍然比较分散，并由国家特派团决定。正如 USAID 报告中所提到的，随着 USAID 继续实施其“自力更生之旅”（Journey to Self-Reliance）战略，USAID 在某些国家的驻外使团可能会提交较少的避孕用品采购资金请求。<sup>17</sup>

- 10 在 2018 年《计划生育市场报告》发表之前，CHAI 和 RHSC 采用 RHI 的数据进行全球采购方支出分析。此后，《计划生育市场报告》采用了来自 UNFPA 采购事务处及 USAID “避孕用品与避孕套发货概述”报告中的数据。
- 11 从 2020 年至 2021 年，全球采购方支出的下降幅度大于根据供应商发货数据得出的 83 个中低收入国家公共部门市值的下降幅度，部分原因在于供应商发货数据包括孟加拉国和印度等国家的采购数据，这些国家利用部分国内资金来采购避孕用品，而全球采购方支出数据中并未包含这类国内资金。此外，供应商发货分析采用 UNFPA 避孕价格指数定价来计算总市值，因为这是定期更新的公开数据来源，但实际定价可能因国家、产品的不同而存在一些差异。
- 12 <https://www.unfpa.org/press/statement-uk-government-funding-cuts>
- 13 <https://www.unfpa.org/press/support-france-safeguard-health-and-lives-millions-women-and-girls?page=27>, <https://www.state.gov/u-s-engagement-with-the-un-population-fund-unfpa/>
- 14 <https://www.unfpa.org/unfpa-supplies-annual-report-2021>
- 15 USAID 关于避孕用品发货的数据取自“2021 财年避孕用品与避孕套发货概述报告”。2021 财年的报告反映了计划生育供资情况，但不包括 HIV/AIDS 资助避孕套；因此，我们排除了 2017 财年至 2021 财年的女用和男用避孕套的市值，以比较不同年份的同一数据集。USAID 报告可在此获得：[https://www.usaid.gov/sites/default/files/documents/CC\\_FY21.pdf](https://www.usaid.gov/sites/default/files/documents/CC_FY21.pdf)
- 16 USAID 财年（Fiscal Year, FY）自当年 10 月 1 日起算，直至次年 9 月 30 日。自 2018 财年以来，USAID 开始在“避孕用品与避孕套发货概述”报告中分享相关数据，这类数据基于订单交付年份，而不是产品发运至各国的年份。
- 17 USAID 的“自力更生之旅”战略旨在促进与东道国政府的合作，以加强地方能力、调动公共和私营部门收入并加速以企业为驱动的发展。<https://www.usaid.gov/documents/1870/journey-self-reliance-fact-sheet>

### Exhibit 10: UNFPA procurement value – contraceptives to LMICs (in USD)



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



Sources: [1] UNFPA Procurement Services Branch data FY2017 - FY2021; [2] USAID "Overview of Contraceptive and Condom Shipments" reports, FY 2017 - FY2021.



虽然 2021 财年全球采购方在避孕用品采购方面的支出有所下降（这主要是由 2021 年 UNFPA 物资供应项目供资削减导致的），但预计 2022 财年及未来几年将出现一些回弹。

UNFPA 已在为 2022 财年及未来几年积极筹款，以抵消 2021 财年避孕用品采购支出方面的下降势头（这主要是由于 2021 年英国外交、联邦和发展事务部（Foreign, Commonwealth and Development Office, FCDO）削减资金造成的）。经过不断努力，UNFPA 的预算很可能将在未来回弹，达到与 2021 年之前相当的水平。例如，作为其前瞻性综合预算的一部分，UNFPA 表示，UNFPA 对 2022-2025 财年的整体收入预测预计将与 2018-2021 年收到的实际捐款相当。<sup>18</sup> 根据附件 10，UNFPA 在 2018-2021 财年的平均避孕用品采购支出约为每年 1.42 亿美元。因此，假设 UNFPA 的避孕用品采购符合 UNFPA 的整体收入预测，这意味着 UNFPA 在未来几年的年均避孕用品采购支出将回弹至高于 2021 财年的水平。

然而，鉴于各国的经济形势严峻，长期出资方供资仍然存在一些不确定性。例如，2022 年 11 月，英国宣布削减 20.5 亿美元的援助预算，而且预计明年将进一步进行削减。<sup>19</sup> 由于经济形势严峻，这是英国三年来第三次削减援助预算。

目前尚不确定哪些地区或领域受到的预算削减影响最大，但据了解，国际发展国务大臣 Andrew Mitchell 希望优先保障人道主义援助支出和妇女及女童方面的援助支出。<sup>20</sup>

2017-2021 财年，USAID 在避孕用品采购方面的支出在相对稳定的范围内波动。<sup>21</sup> 特派团将继续确定各个国家的避孕用品采购支出水平，USAID 也将继续努力提高国内筹资水平，这也是其“自力更生之旅”战略的必然要求。

展望未来，考虑到预期的避孕用品需求增长轨迹，避孕用品采购的资金需求很可能会继续增长。据 FP2030 项目估计，2021 年，在中低收入国家中，现代避孕方法需求未得到满足的女性比例约为 15%。<sup>22</sup> 除当前需求外，RHSC 的 LEAP（生殖健康供应需求的前景与预测）分析表明，与 2019 年相比，2030 年中低收入国家的避孕用品使用者总人数将增加 8800 万。<sup>23</sup> 因此，避孕用品需求可能会持续增长，这也将推动随着时间的推移在不同资金流中增加避孕用品采购资金的需求，以及继续努力提高避孕用品可用性和可及性的需求。

18 <https://www.unfpa.org/press/statement-executive-director-unfpa-integrated-budget-2022-2025-second-regular-session>

19 <https://www.devex.com/news/uk-aid-faces-third-major-cut-in-3-years-with-1-7b-to-be-cut-104513>

20 同上，注释 19。

21 2022 年 3 月 28 日，美国总统拜登向美国国会公布了其 2023 财年预算申请。该预算申请中包括的双边 FP/RH 资金总额为 5.72 亿美元，与 2022 财年批准的资金水平相比提高了 9%。拟向 UNFPA 提供的资金从 2022 财年颁布的 3250 万美元增加到 5600 万美元。2022 年 6 月 28 日，美国众议院拨款委员会公布了其 2023 财年“国家、对外行动和相关项目”（State, Foreign Operations, and Related Program, SFOP）拨款法案报告，其中提出了超出政府预算要求的资金。该法案中包括的双边 FP/RH 资金总额为 8.3 亿美元，为 UNFPA 总计拨款 7000 万美元。2022 年 7 月 28 日，美国参议院拨款委员会公布了参议院版本的 2023 财年 SFOP 拨款法案，其中提议提供 7.1 亿美元的双边 FP/RH 资金并为 UNFPA 提供 6000 万美元的资金。在本文撰写之时，预算对话尚在进行中。有关信息，请访问：<https://www.kff.org/news-summary/white-house-releases-fy-2023-budget-request/>；<https://www.kff.org/news-summary/house-appropriations-committee-releases-the-fy23-state-and-foreign-operations-sfops-appropriations-bill/>，<https://www.kff.org/news-summary/senate-appropriations-committee-releases-fy23-state-and-foreign-operations-sfops-and-labor-health-and-human-services-labor-hhs-appropriations-bills/>

22 FP2030 2021 年衡量报告

23 Weinberger M, Eva G, Gold J, Bellows N, Reidy M, Sanders R 和 Skibiak J. LEAP: 生殖健康供应需求的前景与预测。生殖健康用品联盟，2021。报告可参见 <https://leap.rhsupplies.org/#/contraception>

# 与主要利益相关者讨论的要点

为讨论本报告中观察到的趋势，我们向一些供应商、出资方和其他性与生殖健康项目合作伙伴进行了咨询

在讨论 2017–2021 年的市场趋势时，利益相关者对 2020 年至 2021 年公共部门市场的缩减情况并不感到惊讶，因为 FCDO 在 2021 年宣布了对 UNFPA 的资金支持进行大幅削减。

利益相关者对 SRH 社区为减轻资金大幅削减的影响所做的努力表示赞赏。SRH 社区在以下方面作出了积极努力，包括：在全球计生市场可视化与分析网络（Visibility & Analytics Network, VAN）的帮助下，<sup>24</sup> 确定避孕用品需求最大的国家，并调动资源来满足这些需求；USAID 承诺额外提供 1750 万美元，以帮助填补 10 个国家的供应缺口；UNFPA Supplies 在这一年中额外调动了总额达 880 万美元的资源。<sup>25</sup>

为了减轻 FCDO 提供给 UNFPA 的资金短缺的影响，法国和美国等其他出资方也增加了对 UNFPA 的承诺。<sup>26</sup>

虽然利益相关者承认 2021 年对于避孕用品采购筹资而言十分具有挑战性，但展望未来，他们表示，避孕用品采购的资金前景可能会改善，并向 2021 年之前的水平迈进。利益相关者还建议 UNFPA 汲取 2021 年的经验，尽可能在数年内实现更平稳的预算，以便更好应对筹资形势的意外变化。

除了强调的供资中断和经验教训之外，利益相关者还分享了影响避孕用品采购趋势的其他因素。例如，由于新冠疫情引起的国际运输不稳定，2020 年首次出现的交付延误和交付周期延长一直持续到了 2021 年。<sup>27</sup> 虽然本报告中反映的分析特别侧重于避孕用品的成本和支出，但利益相关者还强调了另一项挑战，即新冠疫情期间的货运和运输成本相对较高。例如，据 USAID 报告，货运成本相比于疫情之前显著增加，海运成本平均增加了 3%，空运成本平均增加了 24%。<sup>28</sup>

利益相关者还强调了产品特定的趋势。鉴于利益相关者对皮埋需求不断增长的经验和市场情报，以及皮埋在美国的避孕方法组合中的占比不断增长，皮埋在已出货 CYP 中所占比例的不断增长的趋势引起了利益相关者的共鸣。随着激素型 IUD 在目标中低收入国家中的推广，利益相关者也很高兴看到该方法被首次纳入《计划生育市场报告》中。他们也急于了解激素型 IUD 和铜制 IUD 市场之间的长期相互影响。例如，一些国家在引入激素型 IUD 的初期所引发的一些趣闻表明，推出该方法的地区也可能重新激发人们对铜制 IUD 的兴趣。随着激素型 IUD 的不断推广，这将是需要在未来几年进行持续监测的关键动态。

最后，利益相关者还指出，虽然《计划生育市场报告》对避孕用品采购情况提供了有意义的概述，但却并不一定能提供针对各国避孕用品分配或消费的看法。<sup>29</sup> 虽然从 2020 年到 2021 年，避孕用品采购市值有所下降，但供应商发货数据并不能用于推断 2020 年至 2021 年各国计生消费量的变化情况，因为消费量会受到各国分销与供应链物流、供应商意识和培训以及最终用户获得保健服务的机会等一系列其他因素的影响。因此，《计划生育市场报告》中的采购数据和趋势不应与消费数据和趋势相混淆。

过去几年来，全球新冠疫情和严峻的经济形势为 2021 年的避孕用品采购制造了一个十分具有挑战性的环境，因此继续监测未来的关键经济趋势至关重要。不过，总体而言，利益相关者仍然对 SRH 社区在这些充满挑战的时期所展现出的适应能力和合作水平印象深刻，并重申只有继续保持强有力的伙伴关系和强大的创新能力，才能确保用户能够可靠地获得有效、优质的避孕产品。

24 <https://www.rhsupplies.org/gfvan>

25 <https://medium.com/its-about-supplies/how-greater-data-visibility-helped-the-reproductive-health-community-confront-the-challenges-of-f02bd9324ba>

26 <https://www.unfpa.org/press/support-france-safeguard-health-and-lives-millions-women-and-girls?page=27>, <https://www.state.gov/u-s-engagement-with-the-un-population-fund-unfpa/>

27 <https://www.unfpa.org/updates/international-freight-alert>

28 2021 年 8 月，USAID 对 USAID 监察长办公室的信息请求作出的回应。网址：<https://oig.usaid.gov/sites/default/files/2021-11/COVID-19%20Information%20Brief%204.pdf>

29 如 2016 年 RHSC “商品差距分析”（Commodity Gap Analysis）中所述，一般采购趋势“也可能反映了除用户消费之外的一些因素，例如填充从中央仓库到各个服务交付点的供应管道及维持充足库存水平所需的数量。采购数量可能会考虑已经存在或订购的供应量、供应链上的库存持有政策以及各级供应品的浪费或“泄漏”。资金限制、价格、激励措施、未来推广项目计划以及出资方或政府本身对特定方法或产品的偏好也可能影响要采购的供应品类型和数量。”链接见（下页）：[https://www.rhsupplies.org/uploads/tx\\_rhscpublications/Global\\_Contraceptive\\_Commodity\\_Gap\\_Analysis\\_2016.pdf](https://www.rhsupplies.org/uploads/tx_rhscpublications/Global_Contraceptive_Commodity_Gap_Analysis_2016.pdf)

# GLOBAL MARKETS VISIBILITY PROJECT ACKNOWLEDGEMENTS

## About the Global Markets Visibility Project

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

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

## Market Definition, Scope, and Coverage

The total public-sector market referenced in this report only includes data for the public sector, which is defined as volumes purchased by public sector procurers such as the United States Agency for International Development (USAID) and United Nations Population Fund (UNFPA), ministries of health, government affiliated procurers as well as social marketing organizations (SMOs).

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

## About the Participating Suppliers

*(in alphabetical order)*

### Bayer

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

### Cipla

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

### Corporate Channels

Corporate Channels India Pvt. Ltd. (CCIPL) is a manufacturer of female contraceptive devices based in India, since 1993. CCIPL's contraceptive product portfolio includes several IUDs (EVE'S Copper T380A, TCu380A Ultra Loadezy, PPIUD, Cu 375, and Cu375SL) that provide long-acting reversible contraception, and Tubal Rings<sup>30</sup> that provide permanent contraception for women.

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

### CR Zizhu

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

### Cupid

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

## Female Health Company

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

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

## Incepta

Incepta Pharmaceuticals Ltd. is a pharmaceutical company based in Dhaka, Bangladesh that manufactures and markets generic drugs. Incepta has a portfolio of more than 600 generic products in 1,100+ presentations, across various therapeutic areas. Incepta currently exports its products to 83 countries around the world. Its contraceptive product portfolio includes oral (combined and progestin only) and injectable contraceptives.

## Medicines360

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

## Organon & Co.

Organon & Co. is a U.S.-based healthcare company. Its contraceptive product portfolio includes contraceptive implants (Implanon NXT, which includes a prefilled sterile applicator), oral contraceptives (Exluton and Marvelon) for LMICs' public-sector markets, and oral contraceptives (Cerezette, Exluton, Marvelon, Mercilon, and for USA/CAN Zoely), contraceptive implants (Implanon NXT) and the contraceptive vaginal ring (NuvaRing) for other markets.

## Pfizer

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

## Pregna

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

## PT Tunggul

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

## Renata

Renata is a pharmaceutical company based in Bangladesh. Its contraceptive product portfolio includes combined oral contraceptives, progestin-only oral contraceptives, and emergency oral contraceptive pills.

## 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 copper IUDs and surgical sutures, based in India. Its key contraceptive products are IUDs, including Copper T 380A, TCu 380Ag, TCu 380 Plus, and SMB Cu 375.

## Techno Drugs

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

## Viatris (Mylan)

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

# APPENDICES

## APPENDIX A - 83 LMICs: MARKET VOLUMES BY METHOD<sup>31</sup> AND COUNTRY, 2017–2021

Exhibit A.1: 83 LMICs - Contraceptive market volumes by method, 2017					
Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Afghanistan	16,665,410	9,800	59,600	100,000	365,200
Algeria	–	–	–	–	1,488,982
Angola	12,000,000	22,000	530,600	18,000	1,807,419
Bangladesh	1,195,200	400,000	6,258,000	–	86,252,000
Belize	–	–	–	–	–
Benin	368,399	34,900	30,600	–	–
Bhutan	–	–	–	–	–
Bolivia	2,001,600	94,600	50,400	–	30,000
Burkina Faso	15,050,020	95,300	481,200	–	3,741,150
Burundi	–	–	17,500	–	169,980
Cabo Verde	–	–	–	–	254,880
Cambodia	1,929,600	40,056	900,000	60,000	7,082,236
Cameroon	6,658,400	95,200	327,000	41,500	298,080
Central African Republic	268,999	–	–	–	95,040
Chad	–	–	–	–	–
Comoros	1,267,200	2,520	40,000	150	60,480
Congo Dem Rep	840,000	364,828	2,143,580	–	1,380,220
Cote d'Ivoire	11,992,968	196,600	243,000	8,000	6,521,413
Djibouti	–	–	–	–	6,480
El Salvador	7,210,720	10,858	209,800	7,182	225,960
Eritrea	8,640,000	12,500	100,000	–	112,560
Ethiopia	57,600,000	1,107,134	7,436,988	440,000	10,794,948
Gambia	5,371,200	16,488	110,000	1,500	235,440
Ghana	–	250,256	106,000	11,500	3,183,960
Guinea	158,136	100,000	–	–	30,240
Guinea-Bissau	6,972,620	27,300	2,500	–	2,160
Haiti	69,455,900	4,116	863,400	–	647,304
Honduras	3,024,000	1,440	21,000	6,000	1,641,840
India	–	–	1,047,488	522,885	2,262,311
Indonesia	–	–	–	–	–
Kenya	229,000	408,781	437,376	126,000	7,921,836
Kiribati	–	–	–	–	–

<sup>31</sup> Female condoms are aggregated with male condoms and hormonal IUDs are aggregated with copper IUDs by country in order to protect data confidentiality.

Exhibit A.1: 83 LMICs - Contraceptive market volumes by method, 2017

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Kyrgyz Republic	–	–	–	–	–
Lao PDR	1,929,000	65,808	76,800	–	701,040
Lesotho	14,001,000	31,200	165,000	–	176,400
Liberia	2,853,000	36,100	319,000	–	5,760
Madagascar	–	256,618	3,012,800	295,019	1,288,800
Malawi	21,759,000	167,408	1,000,000	36,500	236,700
Mali	17,255,400	209,728	293,000	26,000	210,240
Mauritania	–	10,404	88,600	1,500	295,920
Mongolia	8,488,800	800	–	53,000	350,160
Morocco	–	720	–	–	10,000,001
Mozambique	56,748,000	60,016	1,373,600	23,600	3,278,160
Myanmar	35,136,646	18,936	6,108,125	200	16,446,928
Nepal	16,701,000	211,800	641,000	74,000	4,015,160
Nicaragua	2,911,680	504	–	–	50,000
Niger	979,200	54,100	499,000	7,920	437,040
Nigeria	44,137,000	665,160	3,316,700	–	1,229,445
Pakistan	512,480	900	–	495,960	123,840
Papua New Guinea	669,600	30,000	22,000	4,000	82,720
Philippines	–	–	–	–	–
Rwanda	1,631,200	84,062	8,200	13,200	68,400
Samoa	–	–	–	–	–
Sao Tome and Principe	1,108,800	300	28,000	–	98,100
Senegal	–	67,864	160,000	–	139,140
Sierra Leone	19,728,000	230,400	332,650	16,000	1,087,240
Solomon Islands	–	–	–	–	–
Somalia	–	2,500	3,500	–	–
South Sudan	11,340,000	25,016	150,000	–	20,000
Sri Lanka	4,056,620	65,500	–	50,000	3,589,760
Sudan	–	36,936	–	6,000	2,123,400
Tajikistan	4,687,200	–	142,000	–	613,440
Tanzania	4,320,180	798,920	2,830,850	177,000	2,885,763
Timor-Leste	1,080,000	20,000	–	–	–
Togo	8,466,200	67,388	140,000	5,000	25,002
Tunisia	1,000,800	–	–	–	–
Uganda	–	297,652	3,895,400	251,000	249,520
Ukraine	–	–	–	–	–
Uzbekistan	13,217,540	–	–	–	718,989

Exhibit A.1: 83 LMICs - Contraceptive market volumes by method, 2017

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Vanuatu	-	-	-	-	-
Vietnam	21,816,000	12,636	1,196,500	1,239,531	-
Western Sahara	-	-	-	-	-
Yemen	5,304,960	64,288	445,000	-	-
Zambia	16,389,600	161,800	3,418,650	-	3,528,960
Congo	2,160,000	20,376	32,000	500	720
DPR Korea	-	-	-	-	-
Egypt	-	40,032	-	375,045	-
Eswatini	32,415,000	18,406	107,650	5,017	-
Iran	120,000	-	-	73,600	-
Micronesia	-	-	-	-	-
State of Palestine	1,944,000	-	-	-	-
Syria	1,440,000	-	-	7,500	-
Zimbabwe	64,653,000	60,496	1,399,200	10,000	12,716,941
Other LMIC Shipments	5,859,600	1,058,100	5,912,600	308,145	23,003,805
<b>Total Volumes</b>	<b>675,719,880</b>	<b>8,247,551</b>	<b>58,533,857</b>	<b>4,897,954</b>	<b>226,409,613</b>

### Exhibit A.2: 83 LMICs - Contraceptive market volumes by method, 2018

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Afghanistan	–	16,500	307,750	–	224,480
Algeria	5,037,980	–	–	–	10,080
Angola	26,601,000	–	529,750	–	–
Bangladesh	12,355,200	793,064	15,194,000	720,000	105,801,680
Belize	864,000	–	20,000	3,000	45,360
Benin	12,966,000	38,100	38,000	–	2,250
Bhutan	–	–	–	–	–
Bolivia	–	73,300	200,000	10,000	230,022
Burkina Faso	11,720,400	342,940	246,400	–	3,398,400
Burundi	22,039,200	4,000	126,400	–	415,332
Cabo Verde	2,000,160	3,000	–	–	201,600
Cambodia	3,427,200	46,392	700,000	30,000	11,986,296
Cameroon	9,633,600	112,952	338,000	3,500	100,000
Central African Republic	12,960,000	4,800	108,200	738	39,648
Chad	1,008,000	38,846	187,000	–	5,000
Comoros	1,180,800	–	–	–	3,000
Congo Dem Rep	49,969,750	399,170	1,343,100	–	370,560
Cote d'Ivoire	25,420,800	139,088	474,800	23,000	3,867,676
Djibouti	396,000	3,200	70,400	–	–
El Salvador	1,255,968	–	386,100	–	581,040
Eritrea	–	2,200	100,000	–	10,025
Ethiopia	35,004,720	1,205,446	7,753,455	600,000	7,896,030
Gambia	–	1,400	160,500	1,000	660,816
Ghana	33,221,400	282,314	2,179,000	30,500	2,827,200
Guinea	9,360,000	–	100,000	–	51,360
Guinea-Bissau	10,310,400	–	6,600	–	42,120
Haiti	85,745,640	34,016	1,827,000	2,000	100,212
Honduras	24,012,000	1,000	107,000	1,100	74,880
India	–	–	102,000	3,223,328	366,065
Indonesia	–	–	–	852,430	–
Kenya	2,000,000	379,232	470,124	101,225	12,791,937
Kiribati	–	–	–	–	–
Kyrgyz Republic	1,432,800	–	–	220,800	–
Lao PDR	600,000	–	242,000	12,500	660,600
Lesotho	8,192,600	7,644	15,000	10,000	116,682
Liberia	1,180,800	35,000	705,200	–	32,400
Madagascar	5,001,000	325,344	4,866,200	500	204,800
Malawi	166,785,600	223,260	4,947,825	–	1,250,484



Exhibit A.2: 83 LMICs - Contraceptive market volumes by method, 2018

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Mali	13,067,620	56,576	1,578,800	8,757	1,063,635
Mauritania	–	5,700	86,800	–	87,840
Mongolia	5,508,000	6,200	–	28,000	420,000
Morocco	–	–	–	–	–
Mozambique	86,133,400	231,648	3,291,800	97,816	51,120
Myanmar	49,103,686	88,540	2,889,125	54,200	14,847,143
Nepal	13,197,480	176,000	2,170,400	60,000	3,299,530
Nicaragua	11,164,300	2,854	–	12,000	–
Niger	849,600	170,940	914,200	–	658,002
Nigeria	42,934,272	1,023,764	4,731,600	151,800	2,146,764
Pakistan	758,016	10,000	100,000	486,525	–
Papua New Guinea	6,112,800	60,000	5,000	9,964	424,967
Philippines	2,397,600	–	–	50,450	–
Rwanda	31,860,800	256,072	862,200	11,000	55,680
Samoa	–	–	–	–	–
Sao Tome and Principe	1,112,832	500	26,000	–	67,080
Senegal	16,566,000	186,336	–	7,000	–
Sierra Leone	–	151,033	972,800	25,500	435,480
Solomon Islands	–	–	–	–	–
Somalia	72,000	15,240	100,000	–	–
South Sudan	2,476,000	54,000	340,000	–	610,080
Sri Lanka	–	500	–	50,000	2,119,680
Sudan	720,000	51,264	–	4,000	–
Tajikistan	–	–	138,000	100,500	595,224
Tanzania	2,868,000	810,780	2,067,300	23,600	1,273,980
Timor-Leste	–	3,900	–	–	–
Togo	21,247,832	75,264	118,400	–	164,154
Tunisia	2,001,600	–	–	–	–
Uganda	124,701,400	811,576	5,469,525	248,500	4,369,950
Ukraine	21,033,000	–	–	–	–
Uzbekistan	–	–	–	–	–
Vanuatu	–	–	–	–	–
Vietnam	21,816,000	–	–	925,250	–
Western Sahara	–	–	–	–	–
Yemen	1,303,200	37,440	1,093,600	51,700	30,000
Zambia	93,849,400	115,096	1,855,950	–	7,399,200
Congo	–	10,000	–	86,000	12,120
DPR Korea	–	–	–	–	–

Exhibit A.2: 83 LMICs - Contraceptive market volumes by method, 2018

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Egypt	–	160,046	–	3,774,650	–
Eswatini	–	–	–	–	–
Iran	–	–	–	–	–
Micronesia	–	–	–	–	–
State of Palestine	–	–	–	5,000	–
Syria	1,440,000	–	–	40,000	–
Zimbabwe	66,442,460	87,500	1,010,975	25,000	18,265,635
Other LMIC Shipments	4,179,902	1,263,200	7,977,325	156,180	9,714,060
<b>Total Volumes</b>	<b>1,226,600,218</b>	<b>10,434,177</b>	<b>81,651,604</b>	<b>12,339,013</b>	<b>222,479,359</b>

Exhibit A.3: 83 LMICs - Contraceptive market volumes by method, 2019

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Afghanistan	4,002,000	7,800	617,000	175,800	1,503,896
Algeria	-	-	-	-	-
Angola	15,060,576	-	300,000	-	1,212,002
Bangladesh	1,224,000	265,253	4,383,060	300,000	115,651,300
Belize	-	10,000	15,200	-	50,760
Benin	103,000	214,400	125,600	52,000	-
Bhutan	1,584,000	-	-	-	-
Bolivia	10,000	78,500	60,000	-	12,240
Burkina Faso	7,301,000	416,984	1,161,500	41,000	4,800
Burundi	-	130,000	1,080,000	26,050	343,160
Cabo Verde	2,880,000	-	60,000	-	267,120
Cambodia	6,724,800	55,780	750,000	50,000	11,455,614
Cameroon	24,774,470	29,780	40,000	41,100	80,640
Central African Republic	-	738	94,900	13,000	1,615,008
Chad	1,008,000	153,366	379,800	20,000	226,080
Comoros	1,180,800	-	-	500	-
Congo Dem Rep	46,256,800	907,864	3,128,810	211,384	2,297,938
Cote d'Ivoire	25,732,600	180,376	692,050	33,000	2,906,090
Djibouti	288,000	-	-	-	218,160
El Salvador	3,049,000	-	160,000	-	84,672
Eritrea	-	17,300	100,000	-	10,800
Ethiopia	11,628,720	1,558,934	8,006,045	55,863	9,009,906
Gambia	2,548,800	69,984	140,000	-	105,840
Ghana	-	390,383	1,596,700	31,653	4,097,860
Guinea	49,433,000	-	666,600	38,000	287,440
Guinea-Bissau	7,557,900	-	22,500	3,000	221,436
Haiti	68,804,640	10,000	2,691,800	-	670,896
Honduras	10,728,000	144	45,000	-	1,200,000
India	-	-	-	814,796	38,100
Indonesia	5,000	-	-	1,093,300	-
Kenya	38,478,000	373,320	80,000	448,930	3,613,720
Kiribati	-	-	-	-	-
Kyrgyz Republic	198,000	-	-	-	-
Lao PDR	1,490,400	-	256,000	-	2,857,608
Lesotho	1,728,000	2,016	65,800	-	117,900
Liberia	13,440,000	9,800	75,000	12,500	-
Madagascar	-	308,616	5,184,400	90,500	1,599,120
Malawi	119,369,000	670,252	6,569,700	-	2,571,300

### Exhibit A.3: 83 LMICs - Contraceptive market volumes by method, 2019

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Mali	25,216,560	293,636	256,200	29,000	682,560
Mauritania	5,000	18,580	46,200	-	813,960
Mongolia	180,000	13,800	103,260	103,000	285,600
Morocco	-	-	-	-	-
Mozambique	69,433,000	202,108	4,086,200	31,150	4,518,240
Myanmar	26,785,000	80,100	1,425,000	30,000	16,447,915
Nepal	13,999,870	224,200	349,800	-	2,407,144
Nicaragua	-	5,484	-	-	-
Niger	444,000	116,248	100,000	-	1,416,762
Nigeria	60,693,400	1,217,772	3,450,800	329,216	1,457,740
Pakistan	3,749,600	242,600	204,400	1,226,500	40,320
Papua New Guinea	2,997,800	145,000	572,400	-	479,643
Philippines	2,390,400	200,000	-	-	29,808
Rwanda	15,346,000	213,185	441,000	27,000	956,160
Samoa	-	-	-	-	-
Sao Tome and Principe	1,260,376	800	19,000	-	100,080
Senegal	12,218,000	142,056	466,000	72,000	986,580
Sierra Leone	5,589,400	284,900	276,000	57,500	468,720
Solomon Islands	-	-	-	-	-
Somalia	28,800	-	45,000	-	810,000
South Sudan	50,000	-	350,000	-	1,004,400
Sri Lanka	4,913	100,508	-	-	2,119,680
Sudan	-	26,800	146,400	-	6,472,122
Tajikistan	9,572,398	-	166,000	-	717,768
Tanzania	30,880,356	421,154	3,895,300	174,590	4,488,591
Timor-Leste	725,760	10,000	220,000	-	340,704
Togo	26,079,160	79,600	274,400	-	600,192
Tunisia	5,000	-	-	-	-
Uganda	147,135,800	414,360	3,655,140	161,500	436,968
Ukraine	21,382,200	-	-	-	-
Uzbekistan	6,652,800	-	570,000	1,730,000	760,002
Vanuatu	-	-	-	-	-
Vietnam	-	11,000	490,900	476,950	-
Western Sahara	-	-	-	-	-
Yemen	1,449,600	97,708	498,600	128,100	12,694,226
Zambia	60,015,740	94,934	2,884,600	14,800	4,628,694
Congo	-	26,300	19,800	191,405	9,540
DPR Korea	-	-	-	-	74,880

Exhibit A.3: 83 LMICs - Contraceptive market volumes by method, 2019

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Egypt	11,224,800	333,164	–	490,200	–
Eswatini	22,008,000	–	82,999	–	4,500
Iran	–	–	–	–	–
Micronesia	–	–	–	–	–
State of Palestine	1,761,120	–	–	–	–
Syria	1,895,040	–	–	–	–
Zimbabwe	140,329,440	186,600	758,000	48,500	16,751,896
Other LMIC Shipments	5,955,160	456,500	6,291,200	341,900	12,749,040
<b>Total Volumes</b>	<b>1,194,052,999</b>	<b>11,520,687</b>	<b>70,692,064</b>	<b>9,215,687</b>	<b>260,085,841</b>

Exhibit A.4: 83 LMICs - Contraceptive market volumes by method, 2020

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Afghanistan	8,783,160	–	42,200	280,974	504,954
Algeria	–	–	–	–	–
Angola	51,788,140	–	500,000	–	1,568,374
Bangladesh	943,200	20,000	14,867,040	2,500	163,162,360
Belize	–	–	–	–	–
Benin	15,000	10,000	762,000	20,000	441,504
Bhutan	–	–	–	–	–
Bolivia	11,000	36,000	50,000	9,500	14,400
Burkina Faso	26,343,300	236,448	3,041,050	98,400	1,565,376
Burundi	18,439,200	193,100	1,176,000	–	336,492
Cabo Verde	13,512,100	5,000	80,000	–	310,356
Cambodia	124,272	43,160	400,000	–	4,406,662
Cameroon	15,854,400	123,340	1,034,400	4,500	603,900
Central African Republic	6,480,000	63,900	214,600	–	171,360
Chad	9,273,800	–	560,000	–	342,120
Comoros	–	500	–	–	–
Congo Dem Rep	77,059,680	1,194,128	966,200	122,000	3,090,000
Cote d'Ivoire	8,642,000	198,000	987,000	28,500	4,758,577
Djibouti	250,880	200	–	–	39,600
El Salvador	10,127,200	–	50,000	–	467,280
Eritrea	–	14,500	4,000	–	162,000
Ethiopia	1,968,240	1,290,093	5,458,646	16,600	2,570,348
Gambia	–	29,000	193,300	–	150,192
Ghana	11,930,400	316,176	2,059,300	98,850	5,960,232
Guinea	291,000	136,800	59,200	–	51,300
Guinea-Bissau	3,024,000	53,400	232,600	–	800,460
Haiti	21,600,000	11,600	–	–	–
Honduras	16,999,200	49,456	690,900	–	–
India	–	–	–	107,884	24,960
Indonesia	–	–	–	1,047,270	–
Kenya	23,732,800	1,527,332	1,360,048	400,750	3,319,772
Kiribati	–	–	–	–	–
Kyrgyz Republic	–	–	–	300	–
Lao PDR	–	–	526,000	–	1,600,488
Lesotho	4,378,600	2,900	129,800	1,500	660,780
Liberia	15,774,000	81,700	363,000	–	780,120
Madagascar	11,334,760	485,114	3,635,300	216,000	5,438,960
Malawi	59,538,600	386,442	4,810,000	11,400	1,400,232

Exhibit A.4: 83 LMICs - Contraceptive market volumes by method, 2020

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Mali	2,954,200	297,950	937,300	31,000	30,960
Mauritania	–	3,300	175,600	–	385,344
Mongolia	280,800	11,900	75,000	14,400	495,000
Morocco	–	–	–	–	–
Mozambique	106,529,230	124,700	1,136,900	–	2,654,220
Myanmar	17,952,400	52,232	3,463,620	3,500	13,207,812
Nepal	11,695,970	72,500	10,000	–	365,220
Nicaragua	705,600	6,600	–	6,000	–
Niger	17,894,740	96,256	389,860	51,300	4,400,010
Nigeria	76,046,500	1,491,608	4,234,600	722,299	2,993,913
Pakistan	30,096,000	95,200	–	192,112	443,520
Papua New Guinea	4,266,600	31,000	–	–	–
Philippines	–	403,364	–	30,725	–
Rwanda	31,076,000	46,728	58,200	8,000	1,224,009
Samoa	–	–	–	–	–
Sao Tome and Principe	–	200	17,400	–	2,700
Senegal	9,345,000	125,000	1,007,072	28,760	1,157,409
Sierra Leone	2,932,688	516,100	1,515,000	29,000	1,741,998
Solomon Islands	10,000	–	–	–	–
Somalia	–	–	8,400	–	77,001
South Sudan	8,640,000	–	250,000	2,500	1,531,920
Sri Lanka	–	40,064	30,000	50,000	2,119,680
Sudan	4,320,000	59,944	2,500	6,000	4,651,020
Tajikistan	5,889,600	–	–	160,000	496,944
Tanzania	19,067,140	801,040	2,475,000	192,399	6,231,664
Timor-Leste	4,068,000	19,000	118,000	–	126,000
Togo	20,843,800	15,540	316,400	46,000	–
Tunisia	–	–	–	–	–
Uganda	84,725,600	878,680	2,341,900	138,000	1,915,410
Ukraine	–	–	–	–	–
Uzbekistan	6,854,400	–	279,400	830,000	–
Vanuatu	–	–	40,000	–	–
Vietnam	3,888,000	33,000	146,440	169,350	–
Western Sahara	–	–	–	–	–
Yemen	504,000	67,900	70,000	200,000	5,177,940
Zambia	99,441,200	406,532	3,228,400	118,800	5,095,576
Congo	–	625	21,300	148,600	12,600
DPR Korea	–	–	–	–	–

Exhibit A.4: 83 LMICs - Contraceptive market volumes by method, 2020

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Egypt	1,000	53,000	1,387,600	180,030	–
Eswatini	–	–	–	–	9,900
Iran	–	–	–	–	–
Micronesia	–	–	–	–	–
State of Palestine	3,335,042	–	–	–	–
Syria	5,927,900	–	–	–	–
Zimbabwe	57,873,000	264,444	2,555,400	69,000	13,756,208
Other LMIC Shipments	4,111,600	1,126,600	14,319,600	193,560	21,995,237
<b>Total Volumes</b>	<b>1,059,494,942</b>	<b>13,649,296</b>	<b>84,863,476</b>	<b>6,088,263</b>	<b>297,002,374</b>



### Exhibit A.5: 83 LMICs - Contraceptive market volumes by method, 2021

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Afghanistan	–	52,000	605,200	142,700	3,670,668
Algeria	–	–	–	–	–
Angola	385,000	–	600,000	–	–
Bangladesh	6,220,800	845,885	3,926,560	34,500	178,895,520
Belize	122,400	–	–	–	51,192
Benin	6,000,000	20,000	–	10,000	989,280
Bhutan	–	–	–	–	–
Bolivia	–	30,000	–	–	291,114
Burkina Faso	43,021,480	894,124	520,000	–	5,993,475
Burundi	–	173,200	161,550	30,000	424,800
Cabo Verde	–	10,000	150,000	–	318,528
Cambodia	–	52,040	–	55,000	5,957,011
Cameroon	880,020	79,880	–	30,000	95,040
Central African Republic	7,200,000	–	–	–	317,472
Chad	5,784,480	125,976	300,000	–	296,640
Comoros	–	–	–	–	30,240
Congo Dem Rep	196,001	781,100	2,187,100	6,000	1,274,037
Cote d'Ivoire	8,260,620	150,880	524,600	29,900	6,698,447
Djibouti	561,024	3,000	9,600	–	–
El Salvador	714,096	–	–	–	277,920
Eritrea	–	35,200	98,400	5,000	171,900
Ethiopia	3,041,400	1,716,725	953,200	488,000	2,253,150
Gambia	2,200,610	3,000	189,000	–	671,310
Ghana	30,495,200	193,192	2,715,600	53,000	4,329,200
Guinea	28,223,800	100,000	300,000	22,000	20,700
Guinea-Bissau	7,404,190	20,000	3,600	–	11,280
Haiti	–	23,000	410,000	–	268,128
Honduras	43,682,360	26,056	692,200	29,490	651,330
India	–	–	–	574,270	–
Indonesia	–	51,132	–	335,800	–
Kenya	–	706,740	312,800	3,575	300,240
Kiribati	–	–	–	–	–
Kyrgyz Republic	1,814,400	–	–	–	–
Lao PDR	–	–	222,000	–	20,700
Lesotho	1,640,040	3,795	252,600	2,500	763,434
Liberia	7,407,000	41,300	177,200	4,000	693,504
Madagascar	793,800	194,184	1,510,000	9,500	4,416,048
Malawi	145,520,300	358,416	2,008,000	20,100	218,880

### Exhibit A.5: 83 LMICs - Contraceptive market volumes by method, 2021

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Mali	46,485,520	183,505	778,800	17,000	437,040
Mauritania	3,499,200	19,600	65,400	51,500	355,338
Mongolia	187,200	6,000	41,250	49,000	286,000
Morocco	-	-	-	-	-
Mozambique	78,397,400	386,696	2,279,000	8,750	1,967,202
Myanmar	37,621,290	24,640	269,380	-	9,473,857
Nepal	9,252,000	130,000	2,470,000	-	4,975,504
Nicaragua	4,896,000	600	85,000	-	276,066
Niger	-	151,000	838,000	50,500	1,774,224
Nigeria	102,328,200	1,714,504	2,958,775	81,235	1,047,191
Pakistan	18,892,800	246,400	425,000	260,360	1,450,080
Papua New Guinea	2,535,120	25,000	404,000	-	391,878
Philippines	6,451,200	502,917	9,600	-	-
Rwanda	21,467,740	130,016	476,400	2,520	584,424
Samoa	-	-	-	-	-
Sao Tome and Principe	346,320	500	24,000	-	126,720
Senegal	5,505,000	130,084	1,845,200	58,500	813,600
Sierra Leone	13,489,920	349,500	974,900	-	1,189,548
Solomon Islands	-	10,000	-	-	-
Somalia	504,000	18,000	43,000	20,000	194,292
South Sudan	120,000	41,100	150,000	1,000	-
Sri Lanka	1,668,960	104,032	372,800	33,000	-
Sudan	7,552,800	77,400	150,625	35,500	100,080
Tajikistan	10,148,400	7,500	-	-	-
Tanzania	605,000	518,707	1,340,000	25,500	6,057,526
Timor-Leste	-	36,000	122,000	-	139,680
Togo	12,816,000	76,700	60,000	-	48,396
Tunisia	1,512,000	-	-	80,750	-
Uganda	420,326,400	463,564	3,640,200	68,400	2,267,860
Ukraine	-	-	-	30	-
Uzbekistan	-	-	-	534,360	-
Vanuatu	-	-	-	-	-
Vietnam	-	40,000	-	-	-
Western Sahara	-	-	-	-	-
Yemen	-	42,700	-	160,000	-
Zambia	72,474,000	430,900	2,903,600	178,945	3,628,512
Congo	8,640,000	5,100	6,600	406,275	30,600
DPR Korea	-	-	-	-	-

Exhibit A.5: 83 LMICs - Contraceptive market volumes by method, 2021

Country	Condoms - Male & Female	Implants	Injectables	IUDs - Copper & Hormonal	Orals
Egypt	–	365,090	–	–	–
Eswatini	–	4,208	72,000	–	–
Iran	–	–	–	–	–
Micronesia	–	–	–	–	–
State of Palestine	–	–	–	1,000	–
Syria	–	–	–	50,000	–
Zimbabwe	50,475,000	173,324	510,000	15,000	3,813,984
Other LMIC Shipments	2,216,000	422,000	15,751,320	146,550	8,160,126
<b>Total Volumes</b>	<b>1,291,982,491</b>	<b>13,528,112</b>	<b>57,896,060</b>	<b>4,221,010</b>	<b>269,960,916</b>

## APPENDIX B – DATA SOURCES

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

### FP2020 Global Markets Visibility Project

In early 2014, CHAI, in partnership with RHSC and the FP2020 Market Dynamics Working Group, launched the Global Markets Visibility Project to help various donors, suppliers, and partners improve their understanding of the current market size and trends for key contraceptive markets. In the past, CHAI collected historical shipment data by product and country from suppliers for each of the 69 FP2020 focus countries and this year has updated the market report's geographic scope to include the 83 LMICs. For the reports published in 2015, 2016, 2017, and 2018, CHAI partnered with Concept Foundation to collect and aggregate shipment data from participating members of the former RHSC Generic Manufacturers for Reproductive Health Caucus (GEMs). For the subsequent reports, CHAI has collected shipment data directly from the former GEMs suppliers. To date, the Global Markets Visibility Project has collected historical shipment data that covers global procurer sales (USAID and UNFPA), MOH tender volumes and SMO purchases from 17 manufacturers across five family planning product categories. The main analyses and data reflected in this report in the Supplier Shipment Analysis and associated Appendices are based on the supplier shipment data collected through this project.

### U.S. Agency for International Development (USAID)

USAID has provided commodities for family planning and reproductive health activities since the mid-1960s. The Overview of Contraceptive and Condom Shipments report is an annual publication that summarizes contraceptive and condom shipments sponsored by USAID, by value and unit. For the purposes of this year's Family Planning Market Report's Global Procurer Spend Analysis, the FY2017 through FY2021 reports were accessed and used to analyze USAID's spend on contraceptives in LMICs, 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 LMICs for over 40 years. For the purposes of this year's Family Planning Market Report's Global Procurer Spend Analysis, CHAI worked with UNFPA PSB to determine the value of the contraceptive procurement conducted by UNFPA from 2017 to 2021 for LMICs. Values are inclusive of commodity cost and exclude services such as freight, sampling, inspection, and testing and are reported based on the calendar year.

### Reproductive Health Supplies Visualized (RH Viz)<sup>32</sup>

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

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

## APPENDIX C – ESTIMATING THE VALUE OF THE PUBLIC-SECTOR MARKET

The value of the public-sector market was calculated using the most comprehensive available data sources: historical supplier-reported shipment data and RH Viz shipment data. Shipment data is recorded in the following units:

Exhibit C.1: Unit of measurement	
Method	Unit of Measure
Condoms – Female	Piece
Condoms – Male	Piece
Implants	Set
Injectables	Vial
IUDs – Copper	Piece
IUDs - Hormonal	Piece
Orals – Combined	Cycle
Orals – Progestin Only	Cycle
Orals – Emergency	Doses

## Historical Supplier-Reported Data

This year's market report includes historical supplier-reported shipment data from 17 manufacturers – Bayer, Cipla, Corporate Channels, CR Zizhu, Cupid, Female Health Company, Incepta, Medicines360, Organon & Co., Pfizer, Pregna, PT Tunggol, Renata, Shanghai Dahua, SMB, Techno Drugs, and Viatris (Mylan). Collectively, the total volumes cover global procurer sales (USAID and UNFPA), MOH tenders and SMO purchases across five family planning product categories.<sup>33</sup>

**SUPPLIERS HAVE CUMULATIVELY SHIPPED 88 MILLION FEMALE CONDOMS, 57 MILLION IMPLANTS, 354 MILLION INJECTABLES, 37 MILLION COPPER IUDs, 0.2 MILLION HORMONAL IUDs, 1,223 MILLION ORALS (COMBINED & PROGESTIN ONLY), AND 53 MILLION EMERGENCY CONTRACEPTIVES FROM 2017 TO 2021.**

It is important to note that there were several shipments to procurer (USAID, UNFPA, SMOs) warehouses in non-LMICs, such as Belgium, Denmark, Finland, France, Germany, Netherlands, Switzerland, and UK. Although these volumes were initially shipped to non-LMICs,

these shipments were likely to go onto the 83 LMICs. As a result, these non-LMIC volumes were included in the total shipments to the 83 LMICs after it was confirmed with suppliers that the specific non-LMIC volumes were associated with global procurer purchases.

CHAI analyzed the aggregated historical supplier-reported shipment data to confirm that coverage across the public-sector product markets was greater relative to RH Viz shipment data for the 83 LMICs. The aim of collecting historical volumes of all global procurer purchases, SMO purchases and MOH tenders directly from suppliers was to address data gaps observed in publicly available shipment data which only capture a subset of procurers who chose to submit historical procurement data. Furthermore, although some countries report national procurements, many national procurements are not reported in publicly available databases. The cumulative total from 2017 to 2021 for historical supplier-reported shipment volumes to the 83 LMICs and procurer warehouses is greater than RH Viz in every method (Exhibit C.4).

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

Manufacturer	Condoms - Female	Implants	Injectables	IUDs	Orals
Bayer		•	•	•	•
Cipla					•
Corporate Channels				•	
CR Zizhu					•
Cupid	•				
Female Health Company	•				
Incepta			•		
Medicines360				•	
Organon & Co.		•			•
Pfizer			•		
Pregna				•	
Pt Tunggol			•		
Renata					•
Shanghai Dahua		•			
SMB				•	
Techno Drugs		•	•		•
Viatris (Mylan)			•	•	•

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

**Exhibit C.3: Supplier-reported shipment volumes to 83 LMICs by method, 2017-2021**

Method	2017	2018	2019	2020	2021	Cumulative Total
Condoms – Female	22M	13M	22M	18M	13M	88M
Implants	8M	10M	12M	14M	14M	57M
Injectables	59M	82M	71M	85M	58M	354M
IUDs - copper	5M	12M	9M	6M	4M	37M
IUDs - hormonal	0.02M	0.02M	0.03M	0.01M	0.12M	0.2M
Orals - Combined & Progestin Only	218M	213M	251M	283M	257M	1223M
Orals - Emergency	8M	9M	9M	14M	13M	53M

**Exhibit C.4: Supplier-reported shipment volumes as a percentage of RH Viz-reported volumes by method, 2017-2021**

Method	2017	2018	2019	2020	2021	Cumulative Total
Condoms - Female	136%	75%	141%	108%	105%	113%
Implants	167%	115%	143%	143%	131%	137%
Injectables	160%	179%	129%	136%	102%	138%
IUDs - Copper & Hormonal	235%	388%	382%	317%	272%	330%
Orals - Combined & Progestin Only	442%	303%	359%	257%	332%	299%
Orals - Emergency	1529%	537%	675%	593%	394%	576%

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

Sources: [1] Historical Supplier-Reported Shipment Data; [2] RH Viz Shipment Data, retrieved August 2022

## Male Condom Market

RH Viz shipment data for male condoms was used to capture a more comprehensive view of the public-sector family planning market for the 83 LMICs. The report used RH Viz shipment data from 2017 to 2021 and included all male condom shipment volumes to the 83 LMICs as well as volumes associated with procurer warehouses in non-LMICs.<sup>34</sup>

The supplier-reported volumes for female condoms, implants, injectables, IUDs, and orals, together with RH Viz shipment volumes for male condoms, represent the estimated public-sector market from 2017 to 2021.

Exhibit C.5: RH Viz male condoms shipment volumes, 2017-2021					
Method	2017	2018	2019	2020	2021
Condoms – Male	0.65B	1.21B	1.17B	1.04B	1.28B

Sources: [1] RH Viz Shipment Data, retrieved August 2022

<sup>34</sup> Total yearly volumes are based on the year that the product was shipped.



## Total Public-Sector Market in Terms of CYPs

**All shipment volumes were translated to CYPs shipped by dividing shipment volumes by each method's corresponding CYP factor.**

All shipment volumes were divided by the corresponding CYP factor published by USAID<sup>35</sup>. CYP factors calculate the estimated protection provided by different contraceptive methods. Because methods may have different CYPs associated with several different sub-types of that method (e.g., there are different CYP factors for three- and five-year implants) the corresponding CYP of the method sub-type is used. The following exhibit shows the conversion factors used to translate volumes to CYPs.

**Exhibit C.6: Volumes to CYPs shipped conversion factors, 2017–2021**

Method	Per Couple-Years of Protection (CYP)
Condoms - Female	120
Condoms - Male	120
Implants - 3 Year	0.4
Implants - 5 Year	0.26
Injectables - 1 month	13
Injectables - 2 month	6
Injectables - 3 month	4
IUDs - copper	0.22
IUDs - hormonal	0.21
Orals - Combined	15
Orals - Progestin Only	12
Orals - Emergency	20

Sources: [1] USAID, "Couple-Years of Protection (CYP)," January 2022.

35 USAID refreshed its CYP conversion factors in 2022; these updates have been incorporated into the Family Planning Market Report. USAID, "Couple-Years of Protection (CYP)", available at <https://www.usaid.gov/global-health/health-areas/family-planning/couple-years-protection-cyp>.

## Value of the Total Public-Sector Market

The total value of contraceptives was calculated by applying average unit prices to total shipment volumes. Although different prices exist across products and markets, the report estimated implied spend using UNFPA's Contraceptive Price Indicator, given the Contraceptive Price Indicator is publicly available and consistently updated.<sup>36</sup> A publicly available price for hormonal IUDs was published for the first time in the UNFPA Contraceptive Price Indicator in 2021, hence this price has been used for the calculation of hormonal IUD's market value for 2017-2020 as well. Finally, the Implant Access Program price of \$8.50 was applied to implant volumes from 2017 to 2018. In 2019-2021, the average implant price on the UNFPA Contraceptive Price Indicator varied from \$8.50—accordingly, UNFPA's listed price was used in market value calculations for 2019, 2020, and 2021. The average price only includes the cost of the product and does not account for additional costs associated with procurement such as testing, insurance, and shipping costs.

Exhibit C.7: Average unit price

Method	Price Range		2017	2018	2019	2020	2021
	Minimum	Maximum	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
Condoms - Female	\$0.43	\$0.47	\$0.46	\$0.47	\$0.44	\$0.43	\$0.44
Condoms - Male	\$0.02	\$0.02	\$0.02	\$0.02	\$0.02	\$0.02	\$0.02
Implants	\$8.26	\$8.68	\$8.50	\$8.50	\$8.37	\$8.26	\$8.68
Injectables	\$0.77	\$0.81	\$0.79	\$0.81	\$0.77	\$0.81	\$0.81
IUDs - Copper	\$0.30	\$0.43	\$0.31	\$0.30	\$0.31	\$0.37	\$0.43
IUDs - Hormonal	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84
Orals - Combined	\$0.21	\$0.27	\$0.27	\$0.24	\$0.23	\$0.23	\$0.21
Orals - Progestin Only	\$0.28	\$0.32	\$0.32	\$0.29	\$0.29	\$0.30	\$0.28
Orals - Emergency	\$0.25	\$0.40	\$0.26	\$0.28	\$0.40	\$0.26	\$0.25

Notes: [1] For 2017-2018 implants, the Implant Access Program price is used; [2] For 2017-2021, the 2021 publicly available price for hormonal IUDs is used; [3] Otherwise, the price range and unit prices in each year are based on UNFPA's Contraceptive Price Indicator.

Sources: [1] UNFPA Contraceptive Price Indicator, 2017 to 2021; [2] IAP Implant Prices.

36 UNFPA, "UNFPA Contraceptive Price Indicator—Year 2021", available at <https://www.unfpa.org/sites/default/files/resource-pdf/Contraceptive%20Price%20Indicator%202021.pdf>, UNFPA, "UNFPA Contraceptive Price Indicator—Year 2020", available at [https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA\\_Contraceptives\\_Price\\_Indicator\\_2020.pdf](https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptives_Price_Indicator_2020.pdf), UNFPA, "UNFPA Contraceptive Price Indicator—Year 2019", available at [https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA\\_Contraceptive\\_Price\\_Indicators\\_2019\\_V2\\_-\\_EXTERNAL.pdf](https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptive_Price_Indicators_2019_V2_-_EXTERNAL.pdf), UNFPA, "UNFPA Contraceptive Price Indicator—Year 2018", available at [https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA\\_Contraceptive\\_Price\\_Indicators\\_2018\\_.pdf](https://www.unfpa.org/sites/default/files/resource-pdf/UNFPA_Contraceptive_Price_Indicators_2018_.pdf), UNFPA, "UNFPA Contraceptive Price Indicator—Year 2017", available at <https://www.unfpa.org/resources/contraceptive-price-indicator-year-2017>.

## APPENDIX D – ESTIMATING TOTAL LMIC GLOBAL PROCURER-SPEND VOLUMES

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

Going forward, CHAI and RHSC will continue to work closely with the two major global 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 MARKET VISIBILITY

This report has historically included supplementary research and analysis using publicly available data sources in three large markets: Bangladesh, India, and Indonesia<sup>37</sup>. In this section, the analysis is refreshed with the latest data for Bangladesh and India. Publicly available data on government procurement has been limited in Indonesia in recent years, so Indonesia has been removed for now from the market visibility analysis.

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

### Bangladesh

The Bangladesh Ministry of Health and Family Welfare (MOHFW) procured<sup>38</sup> 7 million CYPs for the 2021 calendar year, as compared to 13 million CYPs for the 2020 calendar year, 12 million CYPs for the 2019 calendar year, 17 million CYPs for the 2018 calendar year, and 3 million CYPs for the 2017 calendar year. Procurement contracts in 2021 were awarded primarily to regional and local suppliers, including (but not limited to): Essential Drugs Co., Khulna Essential, M/S, Renata Ltd., Popular Pharmaceuticals Ltd<sup>39</sup>, and Techno Drugs. Although data from only a subset of these manufacturers is included in the supplier shipment data, suppliers represented in the Family Planning Market Report comprised a larger proportion of reported MOHFW volumes in 2021 than in 2020<sup>40</sup>. By applying the same prices<sup>41</sup> used for 2021 supplier shipment analyses to the volumes from the Bangladesh MOHFW procurement data, the implied value from Bangladesh's procurement contracts is estimated to be \$21 million for 2021, as compared to the \$13 million implied by the 2021 supplier shipment data.

Although contraceptive procurement has fluctuated in Bangladesh, consumption has remained stable. A review of Bangladesh's supply chain reports<sup>42</sup> revealed that consumption of contraceptive commodities has been fairly consistent—between 9.5 to 12.6 million CYPs—from 2017 to 2021.

This analysis relies on data from the Government of Bangladesh's Ministry of Health and Family Welfare (MOHFW)<sup>43</sup> for 2017, 2018, 2019, 2020, and 2021.<sup>44</sup>

37 Bangladesh and India accounted for a large proportion of the gap between FP2030-reported users of product-based methods and users implied by the shipment data based on country-specific comparisons (per 2016 analysis, when market visibility analysis was added to the Family Planning Market Report). Note: Indonesia also accounts for a notable proportion of the gap between FP2030-reported users of product-based methods and users implied by the shipment data but is currently excluded from the market visibility analysis given limited publicly available data on procurement in recent years.

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

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

40 Manufacturers from Bangladesh participating in this report include Techno Drugs, Popular Pharmaceuticals Ltd (via Incepta Pharmaceuticals), and M/S Renata Ltd.

41 To estimate the market value in Bangladesh and India, the report applies the same pricing assumptions used for supplier shipment analyses (from the UNFPA Contraceptive Price Indicator) throughout the market visibility appendix. Actual pricing may differ in these markets given the different suppliers and pricing parameters at play. However, the UNFPA prices have been applied to maintain publicly available, consistently updated pricing assumptions throughout the report.

42 Consumption CYP is calculated using data published by the Bangladesh MOHFW consumption trend tracker and the USAID CYP factors. Bangladesh consumption data available here: <https://scmpbd.org/index.php/lmis-report/month-wise-consumption>

43 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>

44 The fiscal year for Bangladesh runs from July 1 to June 30 but, for the purposes of this analysis, monthly procurement data was summed for each calendar year for 2017-2021.

### Exhibit E.1: MOHFW supply chain contraceptive shipment receipt details (publicly available volumes data)

Product Name	Supplier Name	2017	2018	2019	2020	2021
CONDOM	Direct Relief	-	1,584,000	-	-	-
CONDOM	ESSENTIAL DRUGS CO. LTD.	-	56,854,800	11,600,800	72,163,600	91,088,400
CONDOM	KHULNA ESSENTIAL LATEX PLANT (KELP)	-	62,158,800	95,894,000	44,388,400	36,794,400
CONDOM	UNFPA	1,195,200	10,080,000	-	-	-
ECP (2 TAB/PACK)	M/S, RENATA LTD.	-	100,000	100,000	100,000	100,000
IMPLANT (2 ROD)	TECHNO DRUGS Ltd	-	385,000	429,054	-	575,000
IMPLANT (2 ROD)	USAID	35,000	-	-	-	-
IMPLANT (SINGLE ROD)	JAMES INTERNATIONAL	2,880	-	-	-	-
IMPLANT (SINGLE ROD)	Merck Sharp & Dohme B.V.(MSD B.V.)	3,000	-	-	-	-
IMPLANT (SINGLE ROD)	MSD-NV Organon, Organon(India) Private Ltd.	199,980	-	-	-	-
IMPLANT (SINGLE ROD)	UNFPA	-	200,000	5,000	-	-
INJECTABLES (DMPA-IM)	Popular Pharmaceuticals Ltd.	1,000,000	1,000,000	-	-	-
INJECTABLES (DMPA-IM)	TECHNO DRUGS Ltd	5,000,000	18,250,000	8,230,000	15,250,000	14,000,000
INJECTABLES (DMPA-IM)	UNFPA	299,997	-	-	-	-
INJECTABLES (DMPA-IM)	USAID	1,000,000	914,800	-	-	-
IUD (CT-380A)	IPAS Bangladesh	-	9,500	-	-	-
IUD (CT-380A)	MARIE STOPES CLINIC	65,000	56,000	-	-	-
IUD (CT-380A)	SARBAN INTERNATIONAL LTD.	-	-	-	300,000	-
IUD (CT-380A)	SMB Corporation of India	-	450,000	-	-	-
IUD (CT-380A)	UNFPA	-	200,000	-	-	-
IUD (CT-380A)	Pathfinder	-	-	-	-	300
ORAL CONTRACEPTIVE PILL (SHUKHI)	M/S, RENATA LTD.	-	54,800,125	110,000,001	50,500,000	43,940,000
ORAL CONTRACEPTIVE PILL (SHUKHI)	Popular Pharmaceuticals Ltd.	-	16,700,000	-	12,500,000	11,230,000
ORAL CONTRACEPTIVE PILL (SHUKHI)	TECHNO DRUGS Ltd	-	16,700,000	-	38,000,000	32,800,000
ORAL PILL APON	M/S, RENATA LTD.	750,000	4,000,000	1,000,000	3,500,000	9,000,000

## India

Based on India's Ministry of Health and Family Welfare (MOHFW)<sup>45</sup> Annual Report for the 2021-2022 fiscal year<sup>46</sup>, CYPs procured from product-based methods<sup>47</sup> totaled 18 million. This number is lower than the 2017-2018 to 2020-2021 fiscal year average of 44 million CYPs procured annually. Weekly oral contraceptive procurement volumes continued to increase further in 2021-2022 from 2020-2021 (volumes procured increased by 22 percent in 2021-2022 from 2020-2021 compared to an increase of 1 percent in 2020-2021 from 2019-2020, at the time of reporting). Copper IUDs continued to comprise the majority of CYPs provided in the MOHFW basket in 2021-2022; a total of 12 million out of 18 million CYPs provided were from copper IUDs.

Although the MOHFW reports annual shipment volumes based on a fiscal year schedule instead of the calendar years used in this report, for simplicity the same prices (in Exhibit C.7) were used to estimate the implied annual market value for supplier shipment and MOHFW procurement volumes. These calculations show MOHFW procurement values of approximately \$13 million in the 2021-2022 fiscal year and \$37 million in the 2020-2021 fiscal year, compared to the \$1.8 million and \$1.6 million implied by the 2021 and 2020 supplier shipment data.

### Exhibit E.2: Annual reports of Department of Health & Family Welfare (includes fiscal years 2017-18 to 2021-22)

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

Contraceptives	2017-18	2018-19	2019-20	2020-21	2021-22*
Condoms (in million pieces)	526.84	0	378.12	397.1	205.01
Oral Pills (in lakh cycles)	275.25	394.37	591.64	427.63	184.38
Copper IUDs (in lakh pieces)	22.62	88.5	87.73	73.79	27.75
ECP (in lakh packs)	50.44	128	195.74	131.72	2.47
Centchroman Contraceptive Pill (Lakh Strips)	23.99	170.27	116.66	117.69	143.16
Injectable Contraceptive (Lakh Doses)	27	0	31.5	29.27	0

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

Contraceptives	2017-18	2018-19	2019-20	2020-21	2021-22*
Condoms (Million pieces)	483.21	459.51	507.46	244.31	126.11
Oral Pills (Social Marketing) (lakh cycles)	205.31	159.19	147.1	195.98	4.56
SAHELI (in Lakh tablets)	321.76	77.52	0	0	0

\*Figures are Provisional

45 Government of India, Ministry of Health and Family Welfare, "Annual Report of Department of Health & Family Welfare for the year of 2021-22", "Annual Report of Department of Health & Family Welfare for the year of 2020-21", "Annual Report of Department of Health & Family Welfare for the year of 2019-20", "Annual Report of Department of Health & Family Welfare for the year of 2018-19", "Annual Report of Department of Health & Family Welfare for the year of 2017-18", available at: <https://main.mohfw.gov.in/documents/publication/publication-archives>.

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

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

## APPENDIX F – KEY TERMS AND DEFINITIONS

### CYP

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

### CYP mix

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

### Value

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

### Market Share

Market share is the percentage of total value (or volumes, if applicable) of shipment volumes in a market captured by a certain contraceptive method.

### Shipment Volumes

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

### Total Public-Sector Market

The total public-sector market is based on volumes purchased by global procurers, MOH- or government-affiliated procurers and SMOs based on RH Viz data (male condoms) and historical supplier-reported shipment data (female condoms, implants, injectables, IUDs – copper and hormonal, and oral contraceptives) for the 83 low- and lower-middle income countries as per the World Bank income classification in 2020. This is in line with the new global partnership and measurement structure for the sexual and reproductive health (SRH) community announced by FP2030 in 2021. Further information on the LMICs for which FP2030 will report data is available in the “FP2030 Measurement Report 2021”. Note that the FP2030 report includes 82 LMICs, which is one less than the 83 countries in-scope for the Family Planning Market Report. Due in part to data challenges, FP2030 is not presently reporting data on Western Sahara (which was formerly among the 69 FP2020 focus countries.) After consultation with FP2030, however, CHAI and the RHSC have kept Western Sahara in scope for the FP Market Report, for a total of 83 in-scope LMICs.

**APPENDIX G – ACRONYMS**

<b>CHAI</b>	CLINTON HEALTH ACCESS INITIATIVE
<b>CYP</b>	COUPLE-YEARS OF PROTECTION
<b>FP</b>	FAMILY PLANNING
<b>GEMS</b>	GENERIC MANUFACTURERS FOR REPRODUCTIVE HEALTH
<b>IUD</b>	INTRA-UTERINE DEVICE
<b>LARC</b>	LONG-ACTING REVERSIBLE CONTRACEPTIVES
<b>LMICs</b>	LOW- AND LOWER-MIDDLE INCOME COUNTRIES
<b>MOH</b>	MINISTRY OF HEALTH
<b>MOHFW</b>	MINISTRY OF HEALTH AND FAMILY WELFARE
<b>FP2030</b>	FAMILY PLANNING 2030
<b>RHSC</b>	REPRODUCTIVE HEALTH SUPPLIES COALITION
<b>RH VIZ</b>	REPRODUCTIVE HEALTH SUPPLIES VISUALIZER
<b>USAID</b>	UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT
<b>UNFPA</b>	UNITED NATIONS POPULATION FUND



# 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 this report's analyses and allows CHAI and RHSC to address information gaps and construct a comprehensive view of the reproductive health commodities market. We would like to thank current participating suppliers: Bayer, Cipla, Corporate Channels, CR Zizhu, Cupid, Female Health Company, Incepta, Medicines360, Organon & Co., Pfizer, Pregna, PT Tungal, Renata\*, Shanghai Dahua, SMB, Techno Drugs, and Viatrix (Mylan), as well as our partner, Concept Foundation, for their support in collecting and aggregating 2011-2017\*\* data.

We are also grateful to our colleagues from the Consensus Planning Group (CPG)\*\*\*, John Snow Inc. (JSI), the United Nations Population Fund (UNFPA), the United States Agency for International Development (USAID), the Global Health Supply Chain Program – Procurement and Supply Management (GHSC-PSM), and FP2030 for their invaluable feedback during the development and refinement of various market analyses.

\* Renata is a new participating supplier in this year's report. Refer to pages 19-20 for more information on Renata and other participating suppliers.

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

\*\*\* The Consensus Planning Group (CPG), established in 2020, collaborates at the global level to address family planning commodity stock imbalances while also planning to prevent those imbalances from occurring at all. Additional information available at: [https://www.rhsupplies.org/uploads/tx\\_rhscpublications/CPG\\_2020\\_FINAL.pdf](https://www.rhsupplies.org/uploads/tx_rhscpublications/CPG_2020_FINAL.pdf)

