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Decoding India's Stagnant Condom Market

While the global condom industry has witnessed significant growth with the market size pegged at USD 8.5 billion in 2019, the market size in India, is estimated at a mere ~USD 200 million as of March 2020.



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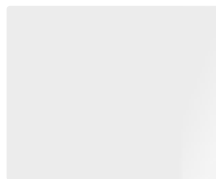


by **Richard Boustred**

Health has never been a bigger concern and priority for the nation as it is today. Preventive measures are an integral part of a healthy lifestyle and condoms should feature as an

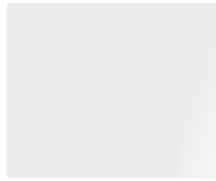
essential aid to ensure holistic health and wellness for the nation, especially the youth. For a country with one of the largest youth population, it is rather surprising to learn that the condom industry has only witnessed a 2% CAGR volume growth in the past 6 years. The industry remains fairly stagnant even as the country struggles with the third highest number of human immunodeficiency virus (HIV) cases across the world, as estimated by a United Nations report. While the global condom industry has witnessed significant growth with the market size pegged at USD 8.5 billion in 2019, the market size in India, is estimated at a mere ~USD 200 million as of March 2020.

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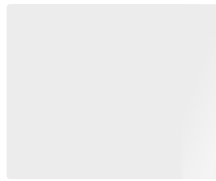


From a supply side view, it appears that the current capacity utilization of industry hovers around 40% including exports. Based on the data from National Family Health Survey - 4 (NFHS -4), 12.9% of currently married women have unmet need with regards to contraceptives. When we apply the Couple Years of Protection (CYP) for condoms, it projects an untapped market potential of 4.1 billion pieces annually. These statistics are further validated by the low condom usage at 5.6%, based on the NFHS-4. Other concerning trend which NFHS - 4 sheds light on, informs us that 70% of male adolescents between the age of 15-19 and 78% of young male between the ages of 20-24 did not use a contraceptive with their last sexual partner.

For a generation that is extremely particular about maintaining a fit and healthy lifestyle and is equally comfortable in their sexuality; the attitude towards contraceptives and condoms seems rather odd and confounding. According to the India sex survey by That's Personal, India has a significant "sexual wellness" industry. Buyers in the age bracket of 18-24 constitute 22% of the buyers along with the other big segment of 25-34 years who constitute 44%. Thus, the youth in the country is curious and sexually active yet seem to lack the guidance or the will to enjoy a safe experience. According to the Global Sex Survey: India, by Durex, 36% of 18-24 year old rely on pornography for information.



From awareness about why a condom is necessary; to deep rooted misconceptions and reservations about use; to the very act of purchasing a condom - every stage is riddled with various barriers, both social and psychological. Despite various awareness campaigns that have been launched in the past, awareness of Sexually Transmitted Diseases and Infections (STDs/STIs) remains limited to HIV and contracting an STD is often not considered a tangible risk when not soliciting commercial sex. Similarly, there are misconceptions that condoms interfere with physical pleasure as well as break the flow of the moment, reducing the excitement and thrill of the experience. First time users, fear being judged by their partners as well. Some of them also feared the partner's reaction if they took out a pre-purchased condom. The partner might see them as promiscuous or assume that the act was pre-planned rather than an impromptu decision. The fear of judgement is further heightened at the time of purchase, and more so for women who fear being labelled as promiscuous. In western countries one can easily pick up a pack of condoms from a supermarket and walk out without feeling judged. This however is not the case in India, as organized retail for pharmacy products is still in its infancy and the neighbourhood chemists contribute 78% of the volume and 81% of the value for the condom market and grocers/general stores emerge as a distant number two with 14% volume and 11% value share.



There is an urgent need to address the above barriers and normalize conversations around contraceptives and condoms. Media can play an important role in changing societal mindset, making it imperative to revisit the regulations regarding broadcasting of condom advertisements only between 10 PM and 6 AM. Advertisements help build the necessary awareness for the category as well as the intent and acceptance towards using condoms as a means to stay safe and healthy. Relegating condom advertisements to late night slots fuels the perception of it being a taboo topic, and make it commercially unviable for marketers to invest in large scale advertising campaigns. Instead, a formal set of guidelines that are category agnostic must be created and intently monitored by a government determined public body. Additionally, regulations such as the price ceiling, make it difficult for condom marketers to make big ticket investments to encourage product or marketing innovations.


There is an urgent need for all relevant stakeholder to come together and take collective action to increase awareness, address social barriers to integrate conversations around sex and contraceptives within mainstream society as well as make the necessary policy and regulatory changes to provide the much-required impetus and incentive to the condom industry. A more collaborative Public Private Partnership (PPP) will help enhance and widen the reach for category awareness campaigns and encourage long term behavioral change across the country. Industry bodies can highlight the low condom usage in their social impact reports and encourage workplace interventions by corporate members. Technology and media could help further amplify the industry messaging, through gaming apps and integrated messaging. Hence, making it more relatable for today's youth as a smart and trendy choice. India considers its youth as one of its most important resources, but the potential of this integral resource can only be harnessed when our youth can embrace holistic health and wellness including their sexual and reproductive health.

Richard Boustred is the Country Director, DKT Janani, India and also the Founding Member of the Condom Alliance.

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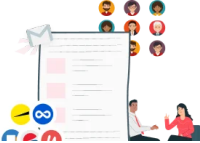
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