

RESEARCH BRIEF

India's family planning market and opportunities for the private sector: An analysis using the Total Market Approach

The Total Market Approach (TMA) aims to engage all three health sectors—public, private nonprofit, and private commercial—to increase access to family planning (FP) and achieve growth and sustainability of the FP market. India's FP market is currently dominated by the public sector; however, a TMA is required to meet India's commitment of providing quality contraceptive services to meet the needs of women and couples for voluntary FP. This paper estimated four characteristics of India's FP market.

RECOMMENDATIONS



The increase in total FP demand and decrease in private sector utilization in the FP market, especially in the urban areas, indicates need for private sector strengthening.



Government programs should continue building demand for voluntary FP use, and making transition of the wealthier users—with ability to pay—to the private sector to increase the available funds for covering users from poor households, who need subsidized coverage.



The private sector should consider what is needed to improve women's access to voluntary FP including subsidizing products and services to low-income consumers only.



Tailored regional strategies can help capitalize on the potential of local FP markets.





Photo Credit : Population Council

Since the public sector cannot afford to provide free FP access to all women in need, the TMA is needed. TMA can be monitored with 4 broad characteristics to assess FP market health—market size, market equity, market accessibility and market sustainability. Tracking these indicators over time, especially using standardized surveys, will help monitor the growth and maturity of the FP market, so that, the service could be available, without any barrier, to the women who need the FP methods.

FINDINGS

- **Market size:** The 67% increase in the size of the FP market (the number of married women using modern FP methods) in the last 20 years was due to a rise in the population of married women of reproductive age and not an increase in the contraceptive prevalence rate.
- **Market equity:** The private sector contribution to the market increased in the last two decades, but the growth rate slowed down over the last 10 years.
- **Market accessibility:** The gap between potential market size (women with a demand for FP) and current market size (current FP users) decreased in rural areas but increased in urban areas. Despite improvements, in rural areas, the current market size failed to reach the potential size projected in 1993. In urban areas, the supply of FP methods did not improve in relation to the growing market size.
- **Market sustainability:** 85% of Indian districts have a large market, but fewer users are using for products and services from unsubsidized sources

METHOD

TMA indicators were assessed using data on married women (aged 15-49 years) from NFHS 1992-93, 1998-99, 2005-06, and 2015-16. The TMA indicators were also calculated for different segments of population from the most recent round of the data, i.e. the NFHS 2015-16.

RASTA

RASTA (Research and Analyses for Scientific Transformation and Advancement) is a multi-institutional research utilization initiative led by Population Council. For more information please contact rasta@popcouncil.org

EVIDENCE

The Evidence Project uses implementation science—the strategic generation, translation, and use of evidence—to strengthen and scale up family planning and reproductive health programs to reduce unintended pregnancies worldwide. The Evidence Project is led by the Population Council

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