

A photograph of several fabric pads, likely menstrual pads, stacked on a wooden surface. The pads feature various vibrant patterns, including geometric shapes, floral motifs, and abstract designs in colors like red, blue, green, and yellow. A dark, semi-transparent rectangular box is overlaid on the right side of the image, containing the title and subtitle text.

KOZO PAD

Market Research & Scoping

Prepared by Pact Innovation
Michelle Risinger, Director
February 26, 2018

INTERVIEW BREAK DOWN

14 Kozo Girls (producers & users)

- Chelstone site
- Mtendere site
- Chilenje site

DREAMS Safe Spaces Program:

20x14 year old school girls,
Muyooma Primary School

Product users: 2 teenage girls at
Chilenje South School

10 Informal Interviews: female
shoppers and store clerks at the
Centro Mall

Key Informant Interviews:

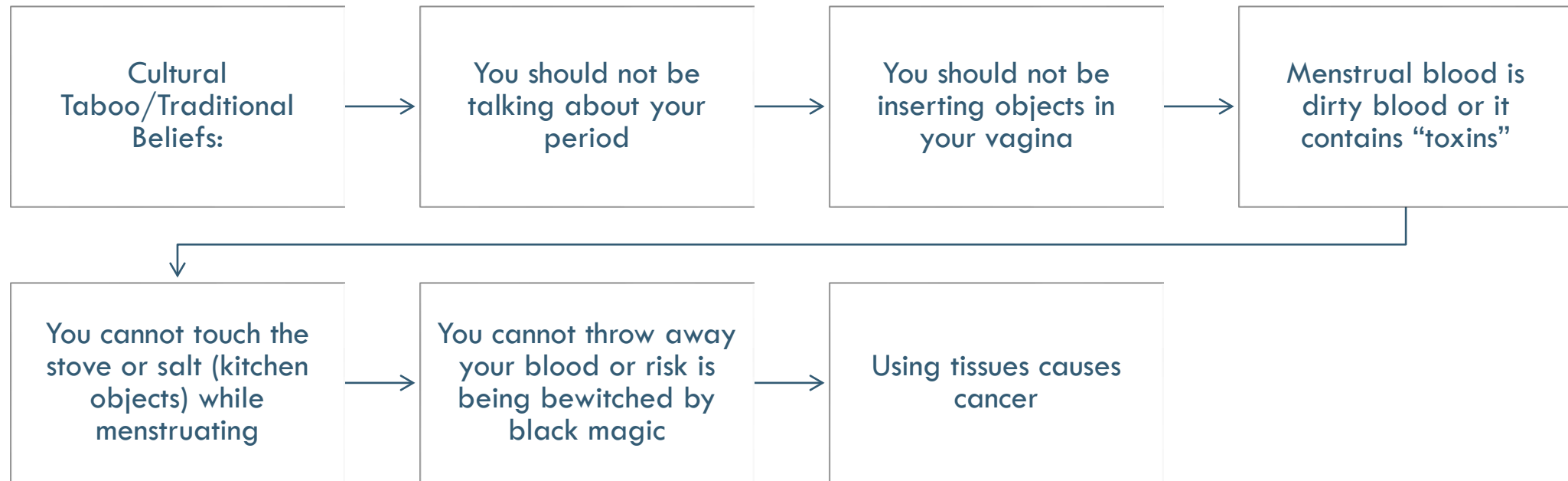
- Alex Burrough, General Manager Live Well
- Victoria Muzumara, Founder ShopZed
- Natasha Kaoma, Founder Copper Rose Zambia
- Guidance Counselors, Muyooma Primary School
- Guidance Counselor at Chilenje South School
- Dot Mead, Sewing Expert and Kozo Advisor
- Pact DREAMS Staff

Product Observation:

Pick N Pay Grocery Store, Centro Mall

Umoyo Natural Health

MENSTRUAL HEALTH IN ZAMBIA



MENSTRUAL HEALTH IN ZAMBIA

- ❖ A 2016 UNESCO report found that 1 in 10 girls in sub-Saharan Africa misses school during their menstrual cycle. By some estimates that is up to 20% of their school year
- ❖ 12 of the 14 Kozo Girls stated they'd missed school during their period
- ❖ Zambian women who are on their period are allowed to call their employers for "Mother's Day" and take time off work.
- ❖ In 2016 Zambian government stated they would distribute free sanitary pads in schools to combat menstrual absences

<http://unesdoc.unesco.org/images/0022/002267/226792e.pdf>

<https://globalpressjournal.com/africa/zambia/zambia-costly-choice-managing-menstruation-missing-school/>

<http://www.independent.co.uk/news/world/africa/zambia-period-day-off-women-menstruation-law-gender-womens-rights-a7509061.html>



WHO ARE THE KOZO GIRLS

- ❖ Age 18-24
- ❖ Completed training as a DREAMS girl and completed 1 week Kozo training
- ❖ Industrious and hardworking
- ❖ Lack employment opportunities
- ❖ Need Marketing and Business education
- ❖ Some are naturally entrepreneurial
- ❖ Most are considered “vulnerable”

TARGET CONSUMER

Socio-economically disadvantaged girls and young women

-This consumer has only recently started menstruating and is not attached to a product

-This consumer cannot regularly afford disposable products and/or lacks a way to destroy such products

-This consumer has strong traditional beliefs or is susceptible to hygiene myths

Secondary: older socio-economically disadvantaged women

- This women may have found a product she likes already but might be financially or culturally motivated to change products

Tertiary: Middle Class/Upper Middle Class Zambian women

- Financially secure, but interested in organic or environmentally friendly products

Other: Foreign philanthropists interested in supporting local Zambian products and sponsoring children



THE PRODUCT

An eco-friendly, organic reusable sanitary pad crafted from local Zambian fabrics with a leak-proof liner, made and sold by Zambian young women.

1 Kozo Pad: 20K / \$2.00

5 Pack of Pads with Carrying Pouch: 120K / \$12.00

12K back into materials, 2k for profit, 6k for commission.
Profit is supposed to be held by the girls for OH costs.

COST SAVINGS: REUSABLE VS. DISPOSABLE

A woman menstruates from approximately age 12-51 or 39 years of her life

Average cost of disposable pads in Zambia	\$2.00 for 7 pads
Conservative cost of disposable pads for 39 years*	\$947.00
Approximate cost of Reusable pads for 39 Years	\$315.69
Savings Calculated for use of reusable pads for a lifetime	\$631.31

<http://www.times.co.zm/?p=27013>

<http://www.worldlifeexpectancy.com/zambia-life-expectancy>

*7 pads is not always enough for 5 days

PRODUCT

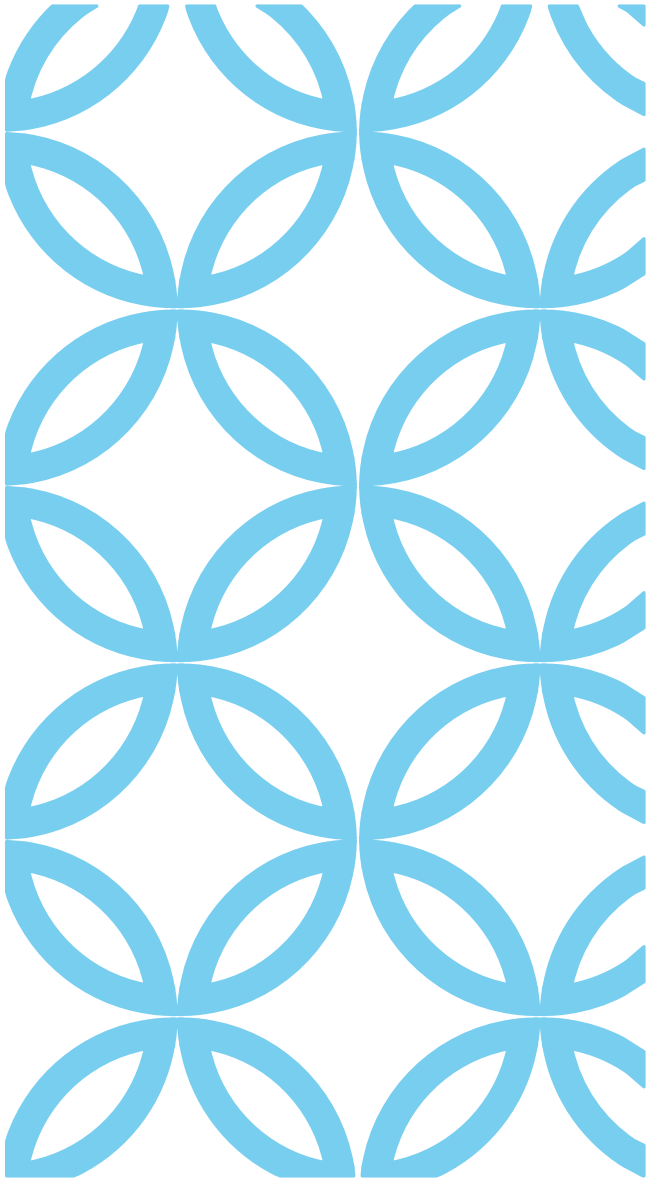
Pros:

- Locally made
- Looks Zambian
- Cost Saving
- Eco-friendly
- Organic
- Aligns with traditional Zambian culture
- Feel more private
- No way to dispose of sanitary napkins – no access to garbage pick up/pads don't burn
- Few Competitors



Cons:

- Product has the possibility of smell if not properly washed
- Select consumers don't want to touch or wash their blood
- Product lacks consistent manufacturing standards
- Reusable pads are new to Zambia and misunderstood
- Clasp is very delicate
- Waterproofing can be temperamental



Live Well, Socially Responsible Distributor “I like this better than the current reusable pad that we stock [AFRIpad from Uganda] which looks manufactured. This looks authentically Zambian made, from Zambian materials. Our consumers will relate to this and I think the board would love it”

16 year female student at Chilenje South School, “I liked it so much I told my mum, I want you to buy me more!”

Sales Clerk at Umoyo “We have eco-friendly customers who come in asking for organic or herbal pads- we have nothing to sell them”

Interview with woman at Centro Mall, “I think it sounds kind of dirty, it sounds nasty, I don’t want to touch or wash the blood”

PRODUCT FEEDBACK



EXISTING MARKET

Product comparison at Pick N Pay:

5 main brands of imported disposable pads:

- Cheapest is 13.99k for 7 pads
- Most expensive is 45k for 14 pads

Tampons available

- No one in the target market claimed to use tampons

No reusable pad

No Cup

Umoyo Natural Health Store

Stocks Menstrual Cup 200k



REUSABLE SELLERS

Copper Rose Zambia: Sells reusable pad. Product design for Kozo. Cost: 150K for 5 pack. NGO.

Project Luangwa: 150K for 5 pack. Guarantees their pads for two years. Imports a “hydrophilic material” to prevent leakage. Foundation subsidized.

AFRIpad: Imported from Uganda. Live Well confirms they stock and sell AFRIpads to disadvantaged communities. Advised they buy in bulk at wholesale and with credit terms. Price in Uganda is \$5.95 US.

CURRENT MANUFACTURING

800 pads
produced since
September 2017

Average rate to
produce a pad:
1 hour

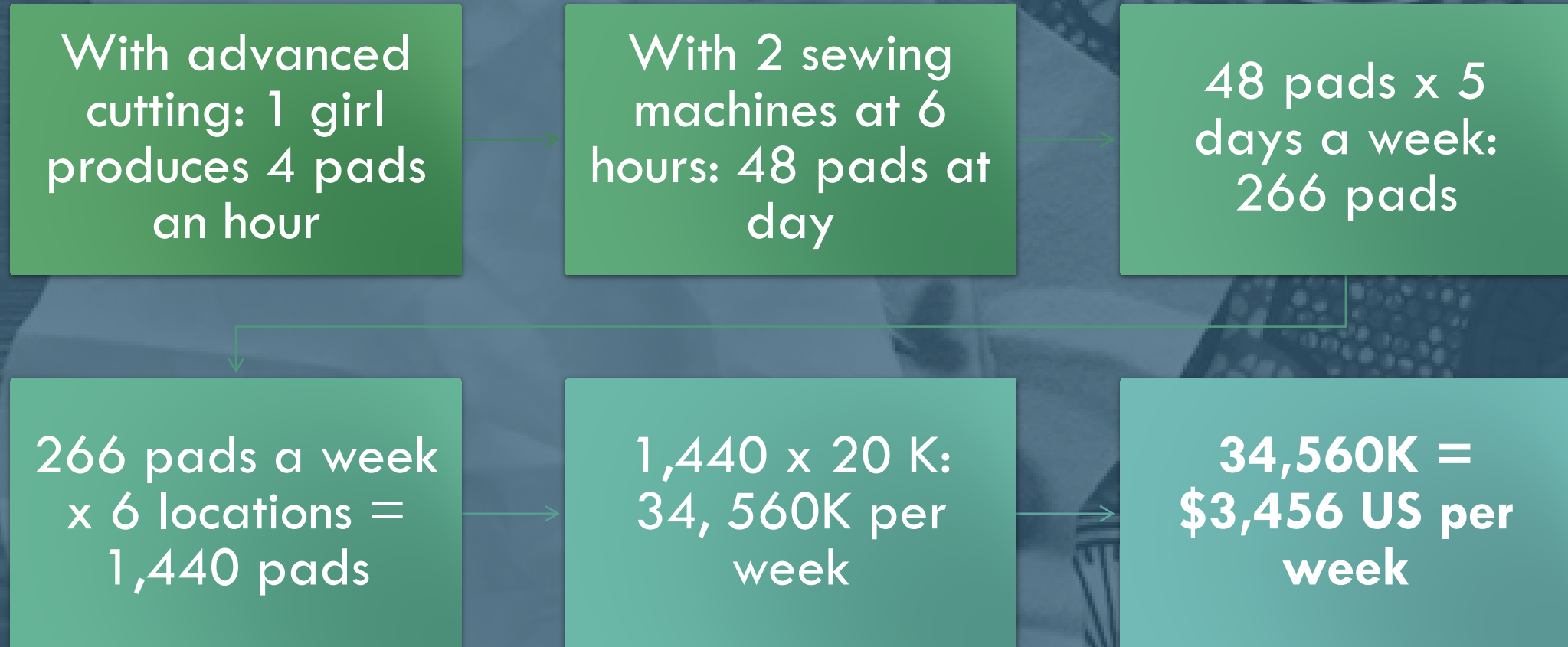
Average weekly
commitment to
pad making: 6
hours per girl

42 Kozo Girls
total across 6
sites

252 weekly hours
of production

Average capacity
for pad
production: **252
pads per week**

MANUFACTURING 2.0*



*This is modeled based on current Kozo operations under DREAMS. A stand alone enterprise could double or triple production with investment

MANUFACTURING ISSUES

Measurement: The girls are using a paper cutout to outline the 3 layers of material. Cutting the material is extremely difficult and if one of the layers is cut incorrectly they must start again

Sewing Machine: Only 2 hand crank sewing machines for each of the 6 Kozo sites which means girls must rotate turns on the sewing machine. Electric machines strongly preferred.

The Clasp: Hand sewing on the clasp makes them extremely delicate and liable to detach. Need a mechanized way of attaching the clasp with a gun.

Location: DREAMS centers poorly equipped to empower fast production

Process: without a manager the girls are not motivated to streamline production process



POSSIBLE PRODUCT IMPROVEMENTS

Address lack of target consumer underwear

Improve Waterproof lining

Further immobilize pad from sliding

Possibly add slow releasing antibacterial

Needs a non-verbal instruction insert

Carry Pouch Needs to Match the Pad Color Scheme

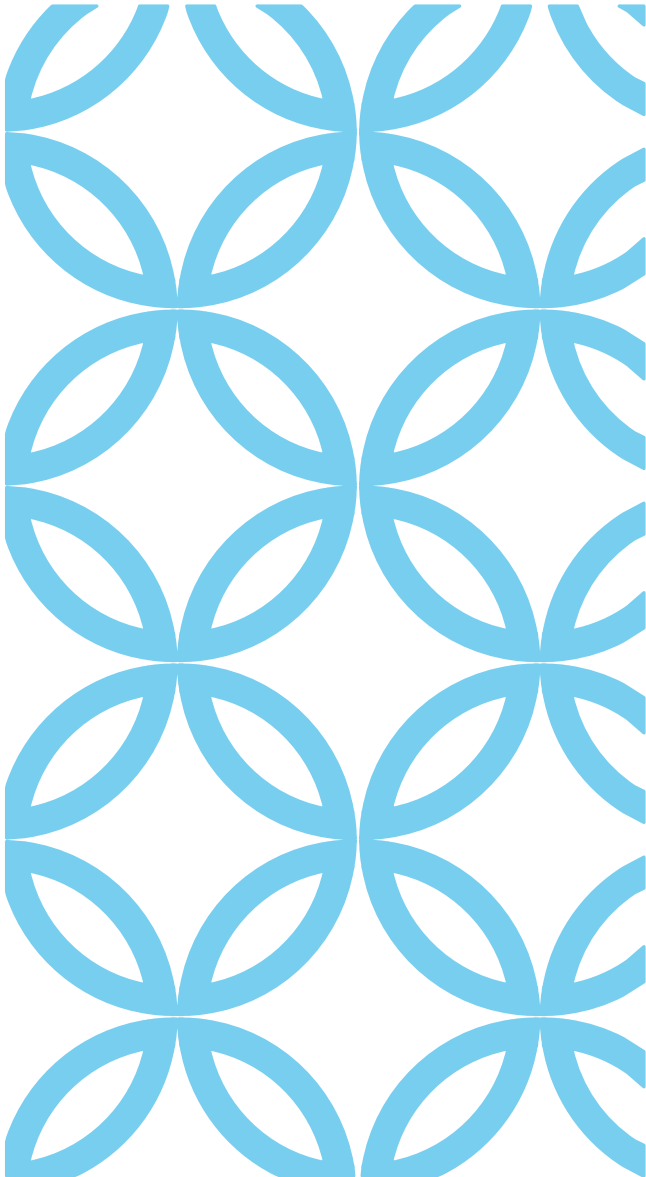


CURRENT SALES MODEL

- Door to Door Selling
- Pact Network word of mouth
- ShopZed

Proposed Model if \$ viable:

- Primary: Bulk Orders
- Secondary: Door to Door
- Secondary: Online



Socially Responsible Distributors: Live Well, Vita Light

Example: Live Well willing to trial 100 pads

Schools: Boarding, Government, Community

Example: 2016 promise by Zambian Govt to provide free sanitary pads

Female Prisons

Maternity Wards/Clinics/Hospitals

Distributor NGOs

Orphanages

Health Stores: Umoyo Natural Health

Example: Umoyo willing to trial pads

SALE AVENUES

MARKETING CONSIDERATIONS

- ❖ Menstrual Health in Zambia is still the primary problem: Kozo pad only part of the solution

- ❖ Reusable pads are not socialized in Zambia:

Interviewees & target market asked extensive questions:

- ❖ Does it smell?
- ❖ How long can you wear it for?
- ❖ Does it leak?
- ❖ Are the pad colors effected by blood/washing?
- ❖ How do you wash it?
- ❖ How do you dry it?
- ❖ Is it safe?

- ❖ Example: Parents at the Muyooma Primary School were not receptive to students using the pads – wanted to be assured it was “safe”. School was uncertain about backing the product. Suggestion would be working with PTA to socialize.

- ❖ Short videos, in-person demonstrations and word of mouth validation will be important

RISKS IDENTIFIED

Confusion about Washing/Drying the product

- Currently no instructional insert
- Product must be washed with soap
- Product ideally should be dried in warm, direct sunlight
- Product should not be worn wet
- Used product should be stored in airtight bag
- Inappropriate washing and drying could cause fungal infections

No Product Guarantee

- Could not find a user who has worn the Kozo pad more than 5 months
- Copper Rose will have 18 months of data in July 2018

Product Licensing

- MOU with Copper Rose
- Kozo never provided with patented design schematics, only approximations

Quality Control

- No consistent quality assurance procedures

Expand the product base:

Door Mats

Hair Ribbons

Chokers

Dresses

Open a Store Front

Expand to multi-purpose product for other medical conditions (OBGYN, GI, etc)

OTHER IDEAS

NEXT STEPS

Kozo under DREAMS

- Develop Elevator Pitch
- Develop Key Selling Points
- Develop Instructional Insert
- Newsletter Language for ShopZed
- Follow Up with Live Well about trial
- Follow Up with Umoyo about trial

Kozo Enterprise

- Complete Market Research (Michelle)
- Cost/Revenue Exercise (Emily)
- Business Modeling begins March 15th