



SWAZILAND

A
TOTAL
MARKET
APPROACH

FOR MALE CONDOMS



Missions: UNFPA and PSI

UNFPA, THE UNITED NATIONS POPULATION FUND, delivers a world where every pregnancy is wanted, every birth is safe, and every young person's potential is fulfilled.

PSI, POPULATION SERVICES INTERNATIONAL, makes it easier for people in the developing world to lead healthier lives and plan the families they desire by marketing affordable products and services.

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This study was approved by the Swaziland Ministry of Health Scientific and Ethics Committee (SEC). Please contact the SEC Secretariat at +268 2404 7712 or +268 2404 5469, should you have any questions.

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Greetings

A MESSAGE FROM BRUCE CAMPBELL AND KIM LONGFIELD

Male condoms offer dual protection against HIV and other sexually transmitted infections (STIs), as well as unplanned pregnancy. All of these factors are important to our two agencies—UNFPA, the United Nations Population Fund, and PSI, Population Services International — and are critical for delivering the health impact we both strive to achieve.

This case study is part of a series that UNFPA and PSI have produced over the course of a year. The series takes a critical look at the communities in which we operate and helps us understand how both agencies can improve our support in those communities and our engagement with other stakeholders, to grow and strengthen the total market for condoms.

We focused our efforts on six African countries — Botswana, Lesotho, Mali, South Africa, Swaziland, and Uganda — that have large condom social marketing programs, are affected by the HIV epidemic, and have high maternal morbidity and mortality relative to their economic development. This series of case studies is intended to inform appropriate evidence-based decisions that increase condom use equitably and sustainably through actions undertaken in all supply sectors. Employing such a total market approach (TMA) means that all three sectors — public, social marketing, and commercial — work together to deliver health choices for all population segments.

We will work together and with other partners to increase condom use and grow the market in a responsible way. Our long-term goal is to offer options to those most in need, people seeking to live their lives free from HIV and unplanned pregnancy. ●

Sincerely,
BRUCE CAMPBELL
Director, Technical Division, UNFPA

KIM LONGFIELD
Director, Research and Metrics, PSI

We will work together and with other partners to increase condom use and grow the market to serve those most in need.



Executive Summary

Swaziland has the highest HIV prevalence of any country in the world, with more than one-quarter of the adult population infected. Although large-scale HIV prevention efforts have resulted in a decline in incidence since 1998, risky sexual behavior and insufficient condom use continue to drive the epidemic. Male condoms are a key component of Swaziland's HIV prevention strategy, and because condoms offer dual protection against both HIV and unplanned pregnancy, they also play an important role in meeting the need for family planning.

In Swaziland, the number of condoms needed to protect all sexual acts from HIV infection and unplanned pregnancy (universe of need) is much higher than the actual number of condoms on the market (volume). Public health efforts encouraging condom use for HIV prevention and family planning have, however, resulted in some very positive trends, and demand for condoms has increased over the years. In 2012, approximately



two-thirds of men and women reported using a condom the last time they had sex, compared to fewer than half in 2006. Rates of condom use have also increased among unmarried youth. In addition, condom use is no longer concentrated among just the wealthy: nearly 40% of condom users fell into the bottom two wealth quintiles in 2012, compared to less than 25% in 2006.

The condom market in Swaziland has traditionally consisted of three sectors: the public sector, which distributes fully subsidized (free) condoms; the social marketing sector, which distributes partially subsidized condoms at low cost;

and the commercial sector, which sells condoms for a profit. While the role of the public and commercial sectors has not changed, the social marketing sector no longer sells partially subsidized condoms. In 2012, PSI/Swaziland, the only social marketing organization in the country, transferred the management of its condom brands to PSI/South Africa, a PSI regional branch for Southern Africa. As a result of this change, socially marketed brands that were previously subsidized are now sold at full cost recovery. Despite these improvements, the market remains heavily subsidized and dominated by free public sector condoms. Concerns about appropriate pricing strategies, "crowding out" the commercial sector, and a desire to collaborate with the government to maximize use of public funds, have prompted UNFPA and PSI to adopt a total market approach (TMA) to help manage the condom supply in Swaziland. TMA requires that all three sectors work together to "grow the condom market" and meet the needs of different segments of the population.

The Total Market Approach (TMA) seeks to maximize market efficiency, equity, and sustainability through the coordination of the public, social marketing, and commercial sectors.

The results of our study yielded several important findings. In order to meet increasing demand, the three sectors must address occasional shortages or inconsistencies in supply that could damage the perception of availability by consumers. Limited coordination between the public sector and implementing partners, including non-governmental organizations (NGOs), results in overstocks of free condoms in some places while other sites are severely under-stocked. Although the change to a regional cost recovery model indicates progress toward market sustainability, two-thirds of the Swaziland market is still fully subsidized. Additionally, the commercial sector continues to account for a negligible share of the market. This study presents a picture of the current market, analyzes past market trends, and provides a set of recommendations intended to help policymakers, donors, and other stakeholders better manage Swaziland's condom market. ●

Methods

This list of TMA metrics comes from the literature and a set of metrics PSI has committed to measuring across countries.¹

METRIC	DEFINITION	CALCULATION
UNIVERSE OF NEED	The number of products or services needed to reach universal coverage in the market	<p>HIV: Male population 15-64 multiplied by average number of risky sex acts per man per year</p> <p>FP: Female population 15-49 multiplied by method mix multiplied by CYP conversion factor*</p>
USE	The percentage of the population at risk using a product or service, or adopting a behavior	Percentage of males and females reporting condom use at last sex
MARKET VOLUME	The number of products or services sold, distributed, or provided in a given market	Total number of condoms distributed in the public, social marketing, and commercial sectors
MARKET VALUE	The dollar value of the total number of products or services in a given market	Average consumer price multiplied by market volume
NUMBER OF BRANDS	The number of distinct brands for a product in a given market	Total number of condom brands on the market
MARKET SUBSIDY	The value of total subsidies (excludes operating and support costs)	For fully subsidized (free) condoms: market volume multiplied by unit cost of goods sold (COGS) **
EQUITY INDEX	The degree to which products or services are used or adopted across socio-economic strata	Percentage of condom users that fall within the bottom two wealth quintiles

* USAID CYP conversion factors provide the units of products needed per one couple year of protection²

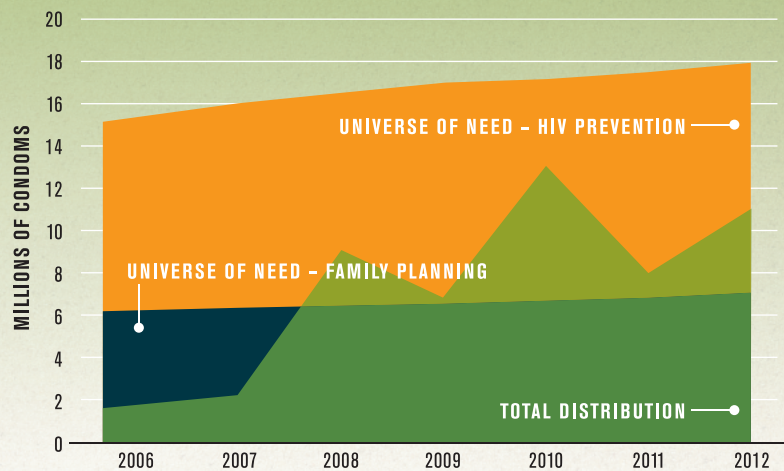
**In cases where some condoms are partially subsidized (e.g., socially marketed), the calculation is "For each brand: the difference between market volume multiplied by COGS, and market volume multiplied by average consumer price."

State of the Market

UNIVERSE OF NEED

CALCULATION:
 HIV: Male population 15-64 multiplied by average number of risky sex acts per man per year

FP: Female population 15-49 multiplied by method mix multiplied by CYP conversion factor

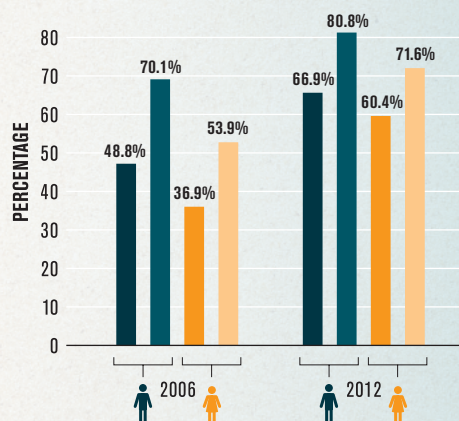


Sources: UNAIDS Investment Framework Study Group³; UN Population Division, 2010 revision⁴; Swaziland DHS 06/07⁵; USAID conversion factors²; Gutmacher Institute. Adding it up: The costs and benefits of investing in family planning and maternal and newborn health (estimation methodology), 2011.⁶

USE

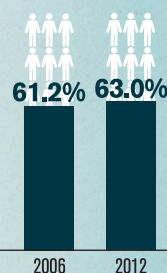
CALCULATION:
 Percentage of males and females reporting condom use at last sex

- MALES AGED 15-49
- UNMARRIED MALES AGED 15-24
- FEMALES AGED 15-49
- UNMARRIED FEMALES AGED 15-24



Sources: DHS 2006/07⁵; Soul City Regional Programme Evaluation 2012^{7,8,9}

Percentage of males reporting casual or multiple partners in the last year who used a condom at last sex



Sources: DHS 2006/07⁵; Soul City Regional Programme Evaluation 2012^{7,8,9}

DHS (2006) and Soul City (2011) are nationally representative surveys and are weighted for comparability. Soul City baseline data is not included due to differences in sampling techniques and questionnaire wording across the study years.

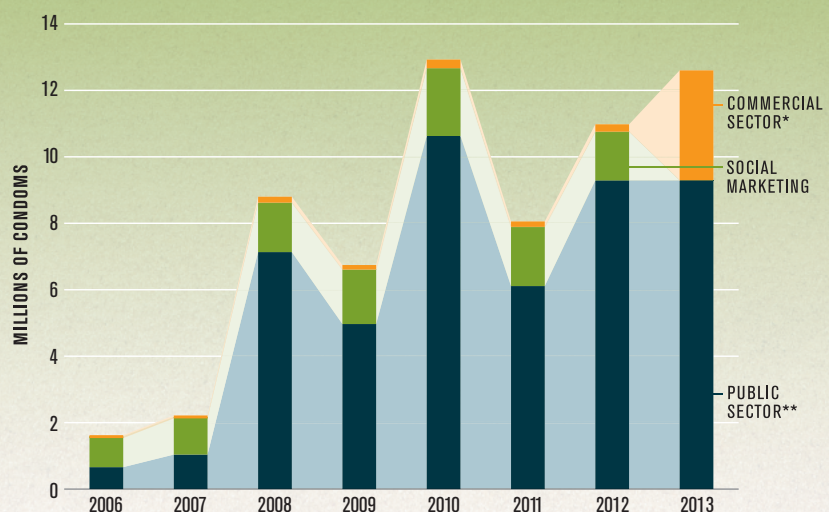
MARKET VOLUME

CALCULATION:
 Total number of condoms distributed in the public, social marketing, and commercial sectors

Sources: PSI¹⁰; Swaziland MOH¹¹

*For 2013, the social marketing sector is considered "commercial sector" because its condoms are profitable. Where data were unavailable, figures used are best estimates.

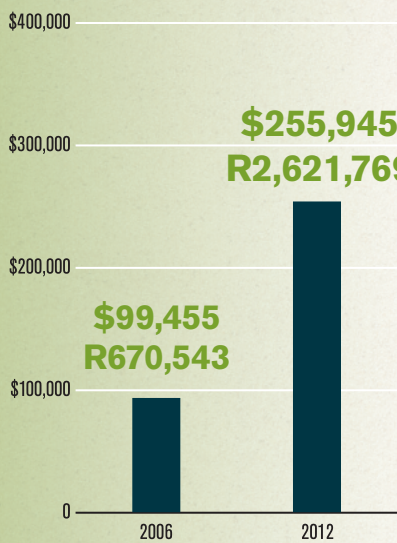
**2012 public sector distribution figures were used for 2013



MARKET VALUE

CALCULATION: Average consumer price multiplied by market volume

$$\left(\text{AVERAGE CONSUMER PRICE} \right) \times \left(\text{MARKET VOLUME} \right) = \text{MARKET VALUE}$$



Sources: PSI²⁰, Swaziland MOH²¹, PSI/Swaziland and PSI/South Africa²²

NUMBER OF BRANDS



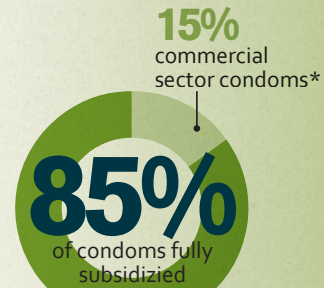
CALCULATION: Total number of condom brands on the market

at least
12
different brands
of condoms
on the market

Source: PSI/Swaziland²³

SUBSIDY

CALCULATION: For fully subsidized (free) condoms: market volume multiplied by unit COGS



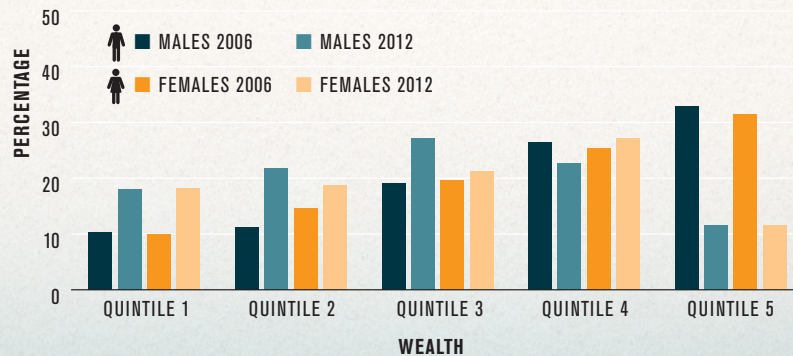
\$627,586
R5.1 million

Estimated subsidy for public sector condoms

Sources: PSI²⁰, Swaziland MOH²¹, PSI/South Africa²⁴
*Includes Trust and Lovers+ brands

EQUITY

CALCULATION: Percentage of condom users that fall within the bottom two wealth quintiles



Sources: DHS 2006/07⁵, Soul City Regional Programme Evaluation 2012^{7,8,9}

DHS (2006) and Soul City (2011) are nationally representative surveys and are weighted for comparability. Soul City baseline data is not included due to differences in sampling techniques and questionnaire wording across the study years

Introduction



Male condoms are an important part of Swaziland's national strategy for HIV prevention.

HEALTH CONTEXT

Swaziland has the highest HIV prevalence of any country in the world, with an estimated 26% of the population aged 15-49 infected.¹⁵ More women (31%) than men (20%) are infected.¹⁵ Risky sexual behavior continues to drive the HIV epidemic in Swaziland, especially multiple and concurrent partnerships and low levels of condom use.¹⁵

Major HIV prevention efforts have resulted in a steady decline of incidence since 1998, which is projected to decline to 2.4% by 2015.¹⁶ Male condoms remain an important component of Swaziland's HIV prevention strategy. Condom use is essential for those who engage in casual or multiple partnerships, or when at least one partner in a relationship is HIV positive. In addition to providing protection against HIV infection, condoms play a role in preventing unplanned pregnancy. Although the frequency with which condoms are used for dual protection is unknown, approximately one quarter of married Swazi women have an unmet need for family planning.¹⁷ A consistent supply of high-quality condoms is required to fill the need for both HIV prevention and family planning. However, it is clear from our research that the current market falls short of meeting those needs. Stabilization and strengthening of the condom market is necessary to increase condom use and ensure long-term, equitable access to condoms.



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https://www.yunbaogao.cn/report/index/report?reportId=5_20320

