



# BOTSWANA

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, 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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Retrieved from [www.psi.org/total-market-approach](http://www.psi.org/total-market-approach)

# Greetings

## A MESSAGE FROM BRUCE CAMPBELL AND KIM LONGFIELD

**M**ale 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

The prevalence of HIV in Botswana is among the highest in the world, with nearly one-fifth of the population infected. Although large-scale HIV prevention efforts have resulted in a decrease in new infections over the past two decades, consistent condom use remains critical for preventing new infections. Male condoms are a vital part of Botswana’s National Strategic Framework for HIV prevention, and because condoms offer dual protection against HIV and unplanned pregnancy, they also play an important role in family planning.

In Botswana, the number of condoms needed to protect all sexual acts from HIV infection and unplanned pregnancy (universe of need) is higher than the actual number of condoms on the market (volume). However, public health efforts to improve access to condoms have succeeded in growing the condom market and condom use among both males and females, including those with higher risk behavior. Inequity remains an issue and there is evidence to suggest that condom use is concentrated among wealthier segments of the population.

The condom market in Botswana 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/Botswana, 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 inefficiencies in the use of public funds, have prompted UNFPA and PSI to adopt a total market approach (TMA) to help manage the condom supply in Botswana. TMA requires that all three sectors work together to “grow the condom market” and meet the needs of different segments of the population.



The results of our study yielded several important findings. In order to meet increasing demand, the three sectors must address inefficiencies in condom distribution and promotion. The new National Condom Strategy sets out to improve reporting systems for forecasting and improve distribution to key populations at risk. Efforts should focus on those most in need, including the poor and those living in rural areas, as well as mobile populations and sex workers. While there is some evidence that the commercial sector is growing, free condoms continue to dominate the market, which limits sustainability. Long-term sustainability requires that those with an ability to pay for condoms purchase unsubsidized condoms rather than rely on free condoms. This study presents a picture of the most recent market trends, analyzes past market trends, and provides a series of recommendations intended to help policymakers, donors, and other stakeholders better manage Botswana’s condom market. ●

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

# Methods

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

METRIC	DEFINITION	CALCULATION
<b>UNIVERSE OF NEED</b>	The number of products or services needed to reach universal coverage in the market	<p><b>HIV:</b> Male population 15-64 multiplied by average number of risky sex acts per man per year</p> <p><b>FP:</b> Female population 15-49 multiplied by method mix multiplied by CYP conversion factor*</p>
<b>USE</b>	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
<b>MARKET VOLUME</b>	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
<b>MARKET VALUE</b>	The dollar value of the total number of products or services in a given market	Average consumer price multiplied by market volume
<b>NUMBER OF BRANDS</b>	The number of distinct brands for a product in a given market	Total number of condom brands on the market
<b>MARKET SUBSIDY</b>	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)**
<b>EQUITY INDEX</b>	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 protection<sup>2</sup>

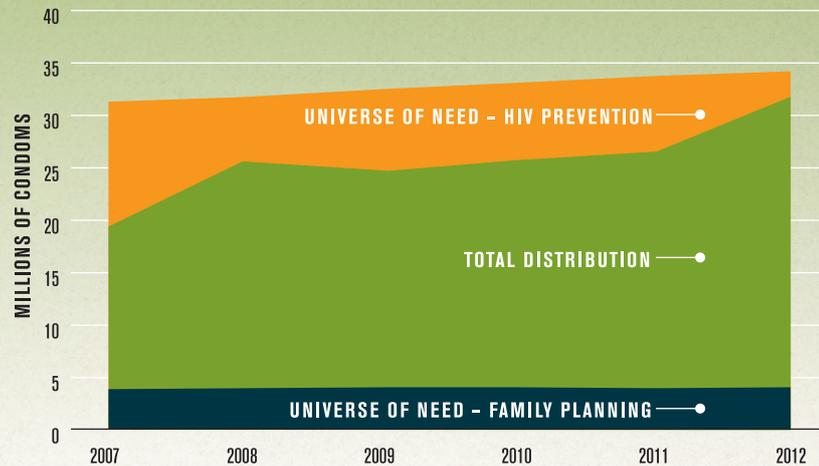
\*\*In cases where some condoms are partially subsidized (e.g., socially marketed), the calculation is "For each brand: the difference between market volume multiplied by COGS, and market volume multiplied by average consumer price."

# 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

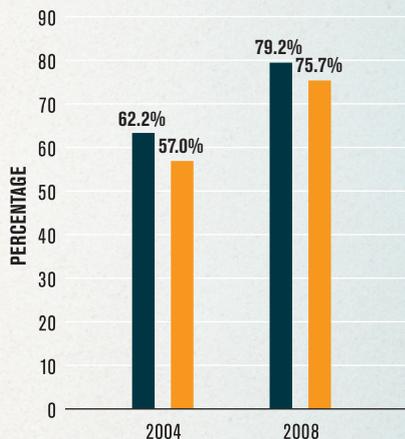


Sources: UNAIDS Investment Framework Study Group<sup>3</sup>; UN Population Division<sup>4</sup>, 2010 revision; USAID conversion factors<sup>5</sup>; Guttmacher Institute. Adding it up: The costs and benefits of investing in family planning and maternal and newborn health (estimation methodology), 2011.<sup>5</sup>

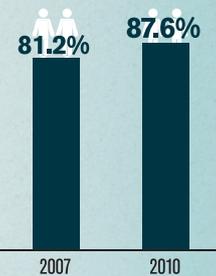
## USE

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

MALES AGED 18-34  
 FEMALES AGED 18-34



Percentage of adults aged 18-34 who used a condom at last sex with a non-marital non-cohabiting partner



Sources: BAIS II<sup>6</sup>, BAIS III<sup>7,8</sup>

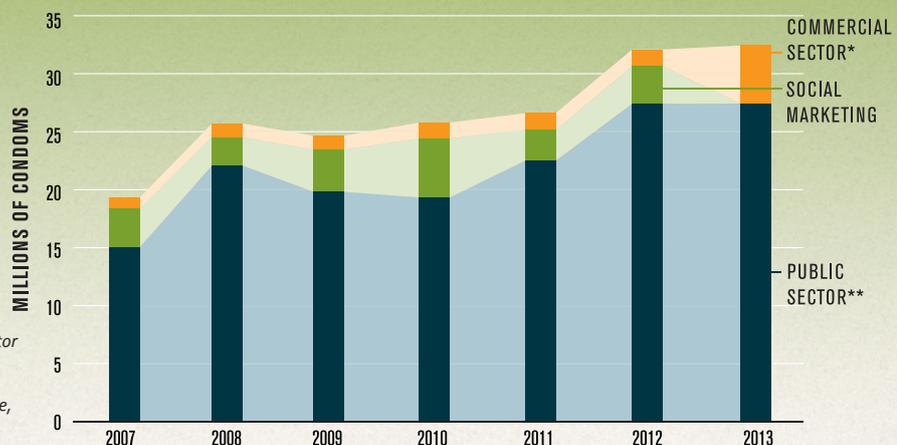
Sources: PSITRaC Survey 2007 and 2010<sup>9</sup>

## MARKET VOLUME

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

Sources: PSI/Botswana<sup>10</sup>, CMS<sup>11</sup>

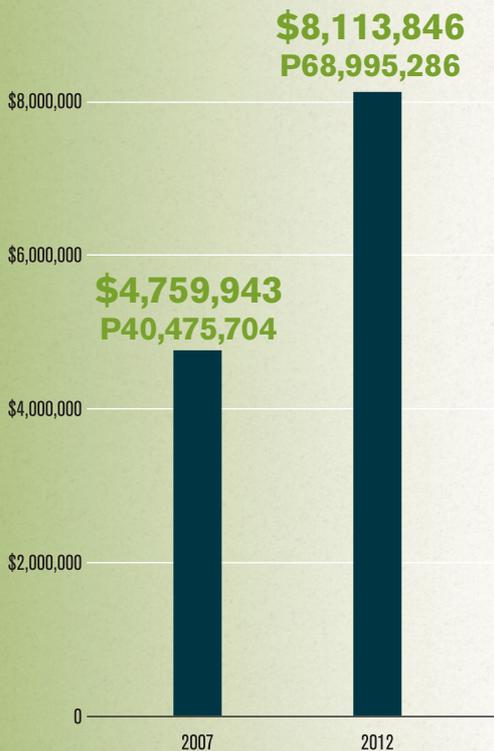
\*For 2013, the social marketing sector is considered "commercial sector" because its condoms are profitable. Where official data were unavailable, figures used are best estimates.  
 \*\*2012 public sector distribution figures were used for 2013



## 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: PSI/Botswana<sup>20</sup>, CMS<sup>21</sup>, PSI/Botswana and PSI/South Africa<sup>22</sup>

## NUMBER OF BRANDS

**CALCULATION:** Total number of condom brands on the market

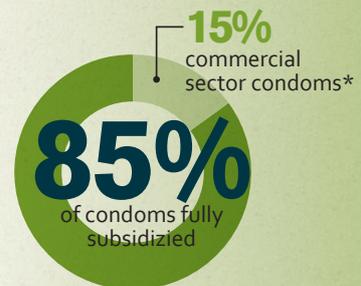


at least  
**13**  
different brands  
of condoms  
on the market

Source: PSI/Botswana<sup>23</sup>

## SUBSIDY

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



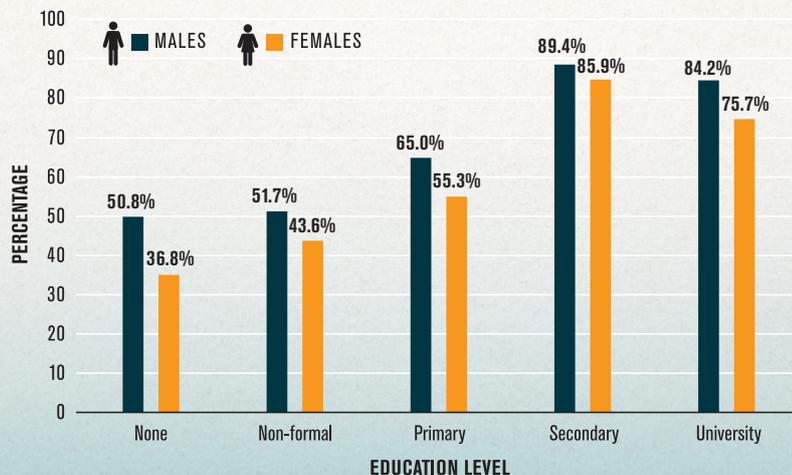
**\$815,127**  
**P6.9 million**

Estimated subsidy for public sector condoms

Sources: PSI/Botswana<sup>20</sup>, CMS<sup>21</sup>, PSI/South Africa<sup>24</sup>  
\* Includes Trust and Lovers+ brands

## EQUITY

**CALCULATION:** Percentage of condom users by education level\*



Source: BAIS III<sup>7</sup>  
\*Wealth quintile data were not available, so education was used as a proxy



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

# Introduction

## HEALTH CONTEXT

The prevalence of HIV in Botswana is among the highest in the world, with an estimated 25% of adults infected.<sup>15</sup> Major HIV prevention efforts have succeeded in decreasing new infections by 71% since 2001, and male condoms remain a critical component of Botswana's HIV prevention strategy.<sup>16</sup> Concurrent partnerships, multiple partnerships, and intergenerational sex are common and contribute to the epidemic.<sup>17</sup> Other key populations at risk include sex workers, migrant workers, transport workers, and miners.<sup>17</sup> Because of the high prevalence of HIV, it is expected that most new infections will occur among people traditionally considered to be "low risk": heterosexual married couples and couples who live together.<sup>17</sup> Consequently, correct and consistent condom use with regular partners is also important.

In addition to providing protection against HIV infection, condoms play a role in preventing unplanned pregnancy, and 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. The National Condom Strategy, implemented in 2012, is taking steps to increase condom use and strengthen the condom market.<sup>18</sup> This study provides additional recommendations to strengthen and stabilize the market, help increase condom use and ensure long-term, equitable access to condoms.



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