



# UGANDA

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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# 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.**

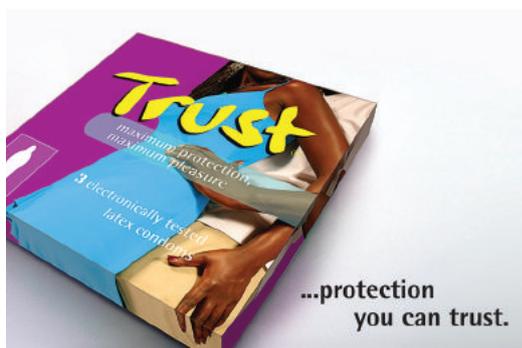


# Executive Summary

In Uganda, the use and availability of male condoms is essential to preventing unplanned pregnancy and the spread of diseases such as HIV/AIDS. From 1992 to 2002, Uganda successfully reduced the prevalence of HIV/AIDS from 18% to approximately 6%; however, some concerning trends are emerging and HIV prevalence has increased with an estimated 7.3% of adults currently infected. Despite some opposition from religious and political leaders, male condoms continue to be an important part of Uganda’s national strategy for HIV prevention, and the dual protection offered by condoms is a key component of reproductive health programs.

In Uganda’s current market, 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). Condom use among the general population has increased, but overall demand still remains low, which helps explain why volumes are also low. Rates of use are higher among youth, but have decreased within some groups, including males with casual partners and females with multiple partners. In addition, equitable distribution of free or subsidized condoms has not improved since 2006: individuals in the wealthiest quintile were still much more likely to report condom use than those in poorer quintiles

The condom market in Uganda consists 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. In 2011, the value of the total market was estimated at \$5,091,264, a 28% increase from the market value in 2006. Approximately 98% of condoms on the market were fully or partially subsidized and commercial sector activity was negligible. Concerns about appropriate pricing strategies, “crowding out” the commercial sector, and inefficiencies in the use of public funds, prompted the Program for Accessible Health, Communication and Education (PACE), PSI’s Ugandan affiliate, and the United Nations Population Fund (UNFPA) to adopt a total market approach (TMA)



to help manage the condom supply in Uganda. The total market approach provides an opportunity for improved efficiency, equity, and sustainability in Uganda’s market for male condoms. TMA requires that the three sectors – public, social marketing, and commercial – 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. As it stands, condom subsidy programs in

Uganda have been inefficient, with wealthier classes benefitting from free and socially marketed condoms. A lack of collaboration between the three market sectors has resulted in an erratic condom supply, which disproportionately affects the poor and those living in rural areas. Enhanced reporting systems could improve commodity projections and forecasting, which would help identify market needs as well as gaps in supply. The overall Ugandan condom market has suffered from limited growth and demand for condoms must be increased, especially among Ugandans with multiple or casual partners. The presence of three socially marketed condoms on the market could be crowding out the commercial sector, especially if prices are not set high enough to encourage the commercial sector to become active on the 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 each brand: the difference between market volume multiplied by unit COGS, and market volume multiplied by average consumer price
<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

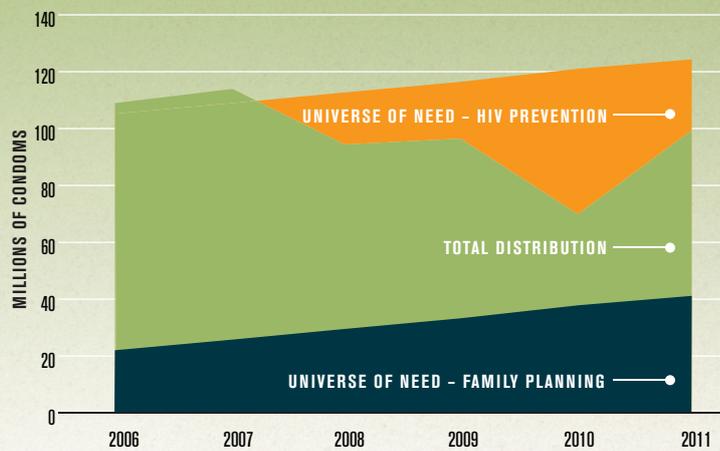
\* USAID CYP conversion factors provide the units of products needed per one couple year of protection<sup>2</sup>

# 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

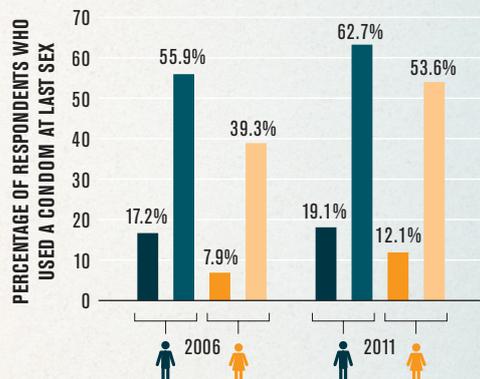


Sources: UNAIDS Investment Framework Study Group<sup>3</sup>; UN Population Division, 2010 revision<sup>4</sup>; Uganda DHS 2011<sup>5</sup>; USAID conversion factors<sup>2</sup>; Guttmacher Institute. (2011). Adding it up: The costs and benefits of investing in family planning and maternal and newborn health (estimation methodology).<sup>6</sup>

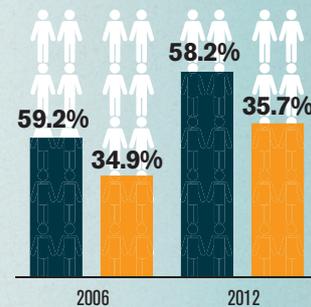
## USE

**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



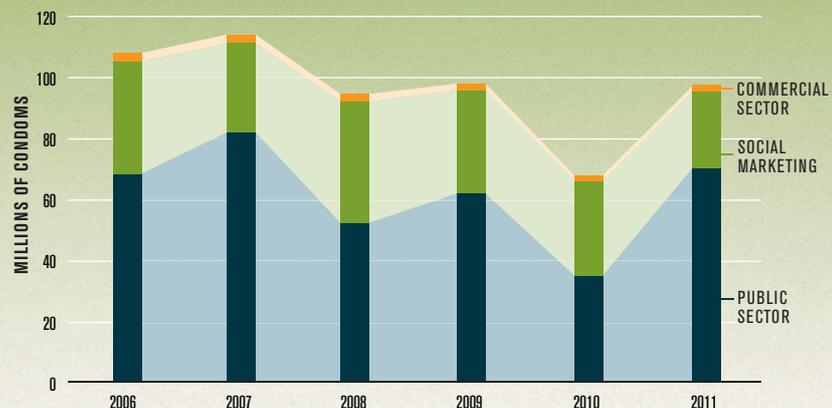
Percentage of respondents with casual partners in the last year who reported condom use at last sex



Sources: DHS 2006<sup>7</sup> and DHS 2011<sup>8</sup>

## MARKET VOLUME

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

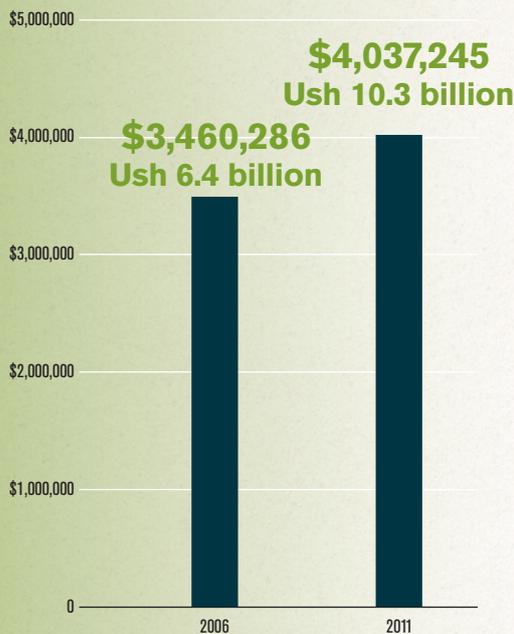


Sources: PSP, PACE<sup>10</sup>, Ministry of Health<sup>11</sup>, Marie Stopes Uganda<sup>12</sup>, Uganda Health Marketing Group<sup>13</sup>  
 \*2012 data were unavailable

## 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<sup>9</sup>, PACE<sup>10,24,25</sup>, Marie Stopes Uganda<sup>22,26</sup>, Uganda Health Marketing Group<sup>23,27</sup>

## NUMBER OF BRANDS



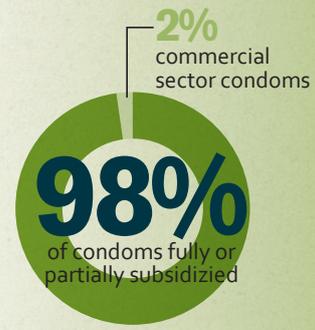
**CALCULATION:** Total number of condom brands on the market

at least  
**19**  
different brands of condoms on the market

Source: PACE<sup>25</sup>

## SUBSIDY

**CALCULATION:** For each brand: the difference between market volume multiplied by cost of goods sold (COGS), and market volume multiplied by average retail price



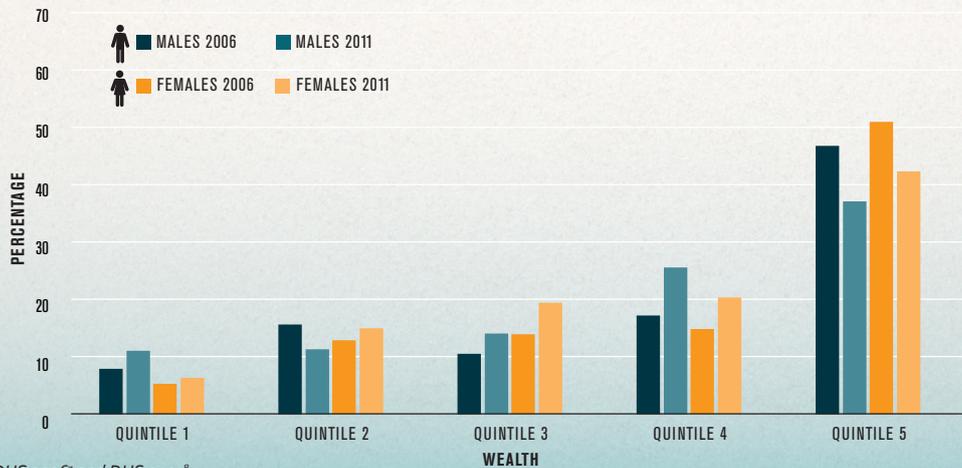
**\$2,924,305**  
**USh 7.6 billion**

Estimated subsidy for public sector and socially marketed condoms

Sources: PSI<sup>9,28</sup>, PACE<sup>10,24,25</sup>, Marie Stopes Uganda<sup>22,26</sup>, Uganda Health Marketing Group<sup>23,27</sup>

## EQUITY

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



Sources: DHS 2006<sup>7</sup> and DHS 2011<sup>8</sup>

# Introduction



Early successes with the ABC approach are giving way to alarming trends, including a rise in HIV prevalence.

## HEALTH CONTEXT

Uganda has been widely praised as a success story in the fight against HIV/AIDS, with a reduction in prevalence from 18% in 1992 to 6.1% in 2002.<sup>19,20</sup> Much of this early success has been attributed to ABC (Abstinence, Be faithful, Condom use) prevention campaigns, an approach addressing different aspects of sexual behavior change.<sup>21</sup> However, early successes with the ABC approach are giving way to more alarming trends. Prevalence has increased slightly in recent years, and an estimated 7.3% of adults are currently infected with HIV. Prevalence is higher among key populations at risk, including sex workers and their partners, men who have sex with men, and boda boda riders.<sup>22</sup> Risky behaviors like casual sex, sex with multiple partners, and transactional sex also contribute to the epidemic.<sup>19, 22-27</sup>

Public health officials around the globe have long recognized that widespread access to male condoms is crucial for preventing new HIV infections, particularly among those who engage in risky sexual behaviors. In addition to providing protection against HIV infection, condoms also play a critical role in preventing unplanned pregnancy, known as dual protection. While information on dual protection is not currently collected in national surveys, we know that more than one-third of Ugandan women reported an unmet need for family planning in 2011.<sup>5</sup> Despite these compelling reasons for a robust condom market in Uganda, many religious and political leaders in Uganda oppose the use of condoms. Our research indicates that numerous changes must be made to improve condom use and ensure access to high-quality condoms for both HIV prevention and family planning.



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