



# MALI

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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Recommended citation:

Pallin, S.C., D. Meekers, K. Longfield, O. Lupu. November 2013.

Mali: A Total Market Approach. PSI/UNFPA Joint Studies on the Total Market for Male Condoms in Six African Countries.

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

In Mali, the use and availability of male condoms is essential to preventing unplanned pregnancy and the spread of diseases such as HIV. Male condoms are an important part of Mali's national strategy for HIV prevention, and the dual protection offered by condoms is a key component of reproductive health programs, especially for youth who may not ordinarily seek medical advice or other contraceptive methods before becoming sexually active.

In Mali's current market for male condoms, 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). Demand for condoms remains very low, which helps explain why volumes are also low. In 2006, only 8.9% of males and 1.9% of females reported using a condom the last time they had sex, and individuals in the wealthiest quintile are more likely to use condoms than those in poorer quintiles.<sup>7</sup> While rates of use are higher among youth and individuals with multiple or casual partners than reported in previous years, condom use is still low.

The condom market in Mali consists of three sectors: the public sector, which distributes fully subsidized (free) condoms; the social marketing sector, which sells partially subsidized condoms at low cost; and the commercial sector, which sells condoms for a profit. In 2011, the estimated total market value was \$869,426.<sup>8-11</sup> Approximately 98 percent of condoms on the market were totally or partially subsidized. Concerns about appropriate pricing strategies,

"crowding out" the commercial sector, and an inefficient use of public funds, have prompted PSI and UNFPA to adopt a Total Market Approach (TMA) to help manage the condom supply in Mali. TMA requires that the three sectors – public, socially marketed, and private – work together to "grow the condom market" to 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 Mali are inefficient, with wealthier classes benefitting from free and socially marketed condoms. Meanwhile, price controls enforced by the government have hampered growth within the commercial sector. Until they are lifted, the market for male condoms will remain stagnant. The socially marketed sector should also raise the price of its condom and promote the entire condom category, not

just its own brand. Perhaps most importantly, increasing informed demand and promoting higher rates of condom use among Malians – especially for HIV prevention – is crucial. This study is intended to encourage policymakers, donors and other stakeholders to work strategically and collaboratively to better manage Mali'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.**



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# 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 cost of goods sold (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

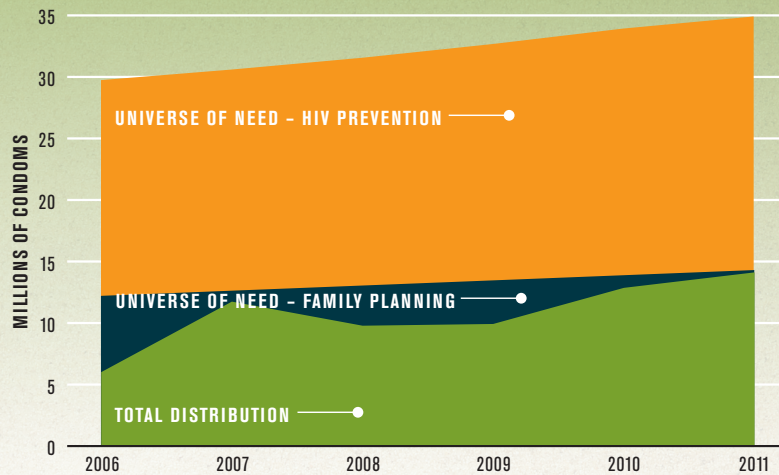
\* USAID CYP conversion factors provide the units of products needed per one couple year of protection<sup>2</sup>

# 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

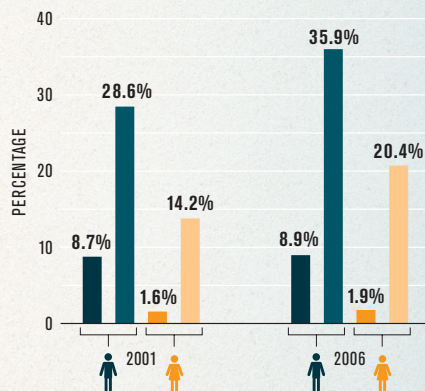


Sources: UNAIDS Investment Framework Study Group<sup>3</sup>; UN Population Division, 2010 revision<sup>4</sup>; USAID conversion factors<sup>5</sup>; Guttmacher Institute. Adding it up: The costs and benefits of investing in family planning and maternal and newborn health (estimation methodology), 2011.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

## USE

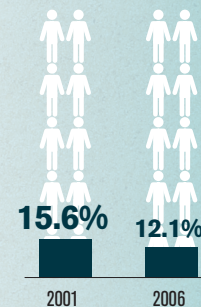
**CALCULATION:**  
 Percentage of males and females reporting condom use at last sex

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



Sources: DHS 2001<sup>6</sup>, DHS 2006<sup>7</sup>  
 \*DHS 2012 data were not available

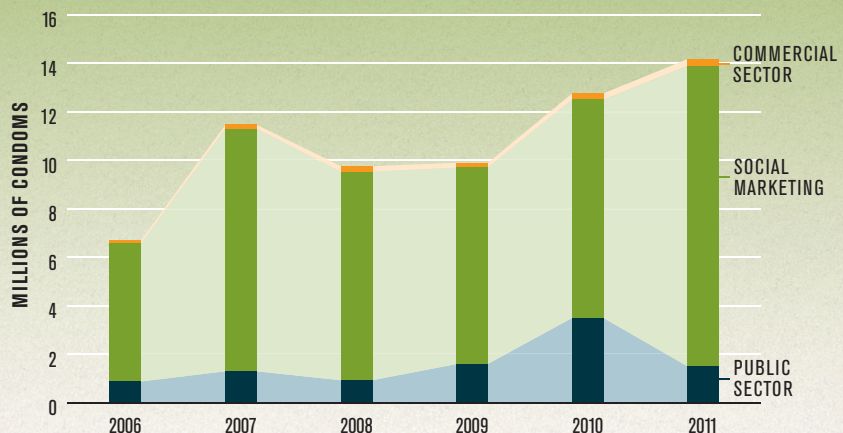
Percentage of males with casual or multiple partners in the last year who reported condom use at last sex



Sources: DHS 2001<sup>6</sup>, DHS 2006<sup>7</sup>

## MARKET VOLUME

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



Sources: PSI/Mali<sup>8</sup>, CSLs<sup>9</sup>, PSI<sup>10</sup>

## 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>10</sup>, PSI/Mali<sup>11,12</sup>, CSLS<sup>9</sup>

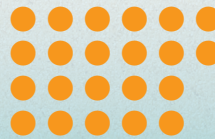
## NUMBER OF BRANDS

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

fewer than

**10**

brands have a long-lasting presence on the market

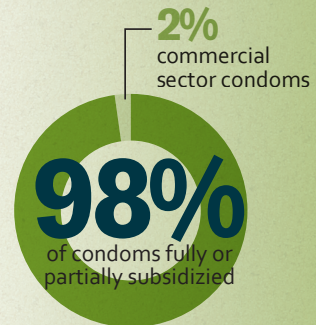


at least  
**22**  
different brands of condoms on the market

Sources: PSI/Mali<sup>11,12</sup>, Weissman<sup>13</sup>

## SUBSIDY

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



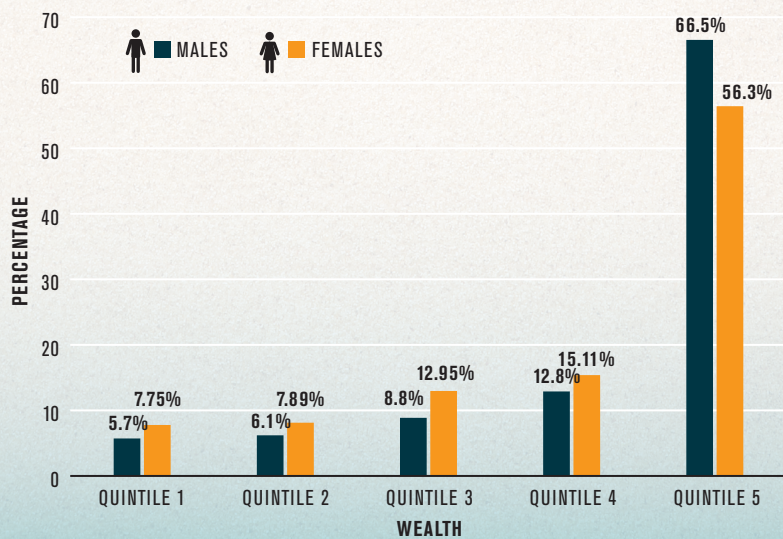
**\$120,473**  
**CFA 58 million**

Estimated subsidy for public sector and social marketing condoms

Sources: PSI/Mali<sup>11,12</sup>, CSLS<sup>9</sup>, PSI<sup>10</sup>

## EQUITY

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



Source: DHS 2006<sup>7</sup>

# Introduction



**Widespread access to male condoms is important for preventing new HIV infections and offering family planning options to Malians in need.**

## HEALTH CONTEXT

HIV prevalence remains relatively low in Mali: an estimated 1.3% of adults between 15 and 49 years old are infected.<sup>13</sup> This represents a small decrease from 2001, when prevalence was estimated at 1.7%, and is less than half of the level of prevalence in 1999.<sup>14</sup>

Despite these improvements, HIV prevalence remains high among key populations at risk. Among female sex workers, the level of infection increased 7% between 2000 and 2006.<sup>15</sup> Prevalence among street vendors (5.9%), truck drivers (2.6%), domestic servants (2.2%), and ticket touts (2.2%) is much higher than the national average.<sup>15</sup> Studies among Malian youth also suggest that there has been a shift away from traditional views on premarital sex and that casual sexual relationships are becoming more common.<sup>16</sup> And while the age for females' first sexual encounter appears to be increasing, sexual debut for males is occurring earlier.<sup>16,17</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 play a critical role in preventing unplanned pregnancy. While information on dual protection is not currently collected in national surveys, we know that nearly one-third of Malian women reported an unmet need for family planning in 2006.<sup>13</sup> Condoms may be an especially important contraceptive option for youth who are unlikely to seek medical advice or other methods before becoming sexually active.<sup>15</sup>



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