

Applying a Total Market Approach to DMPA-SC

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As a safe, effective, and easy-to-use “all-in-one” injectable, DMPA-SC is poised to increase access to family planning and improve the method mix for women around the world. DMPA-SC can be provided through community-based services, pharmacies, or drug shops—and even by women themselves through self-injection, increasing their control over contraceptive needs. With so many different stakeholders potentially interested in DMPA-SC, its introduction and integration can benefit from a total market approach (TMA) to improve coordination, implementation, and scale-up. TMA has gained global traction as a process to understand and coordinate the actors providing family planning products and services—and to influence market-shaping interventions among the public and private sectors.¹

What Is a Total Market Approach (TMA)?

TMA is an evidence-based process to identify market players and understand how they can contribute to improved access to information, products, and services for family planning. As illustrated in Figure 1, the process uses data to understand market trends, recognizes the comparative strengths of various sectors, and uses market-shaping strategies to influence positive sustainable growth of the market.¹ The goal is to create greater equity, increase health

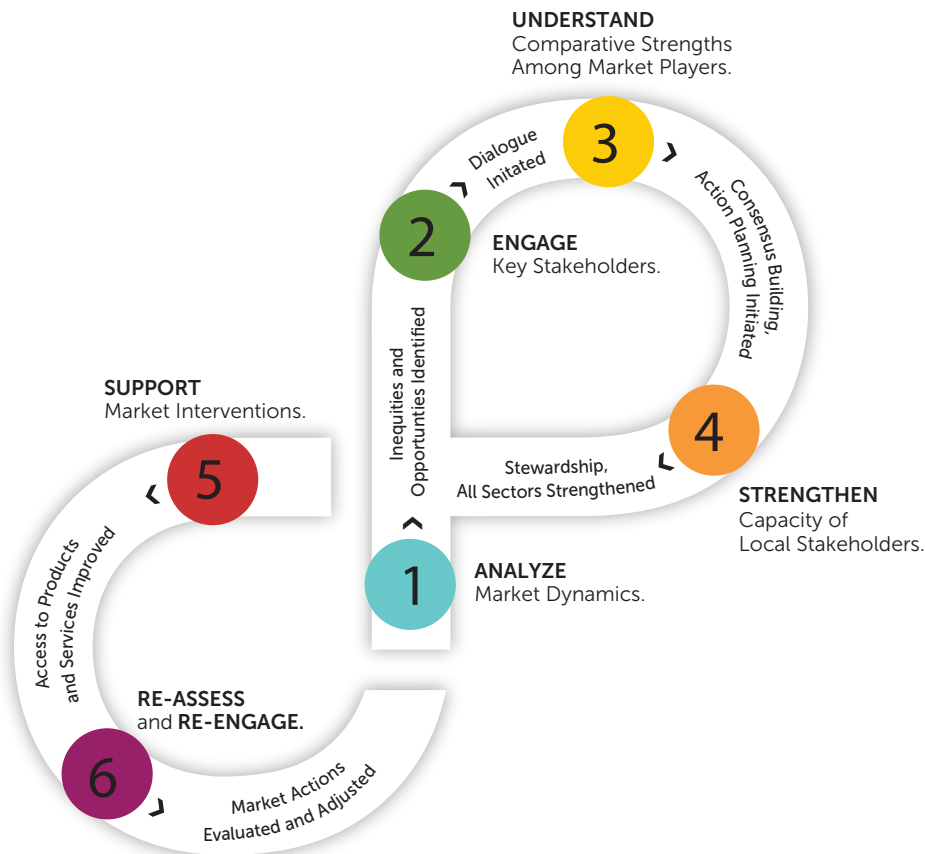
impact, and improve sustainability of family planning markets through investments made by all sectors.

This approach recognizes the importance of multisector collaboration and routinely engages a range of actors to improve programming. At the global level, international stakeholders are advocating for TMA by engaging with multinational manufacturers, integrating TMA into planning and programming, and documenting results and best practices. At the country level, governments are bringing together a wide spectrum of market players, either through existing family planning working groups or by creating dedicated TMA platforms. In particular, TMA encourages stakeholders to consider the current and potential role of the private sector, which is often underestimated or not considered at all.

Why is TMA Important for DMPA-SC?

In the complex and dynamic family planning markets that exist today, TMA can help DMPA-SC achieve balanced and sustainable growth. The approach examines cross-cutting trends in use, sourcing, and economic/geographic access to understand how markets are evolving and to capitalize on and build momentum. For DMPA-SC, strategic coordination will help ensure that both public and private sectors are maximizing their comparative advantage and contributing to sustainable access.

¹ The private health sector refers to a large and diverse community comprising both for-profit and not-for-profit entities that lie outside the public health sector. The private sector covers a wide range of health sector entities, including individual private practitioners, clinics, hospitals, and laboratories and diagnostic facilities; nongovernmental organizations; faith-based organizations; shop-keepers and traditional healers; pharmacies; and pharmaceutical wholesalers, distributors, and manufacturers.



Source: Palladium 2016¹

What are Key TMA Actions for DMPA-SC Introduction and Scale-Up?

Consider How Introduction and Scale-Up of DMPA-SC will Impact and Benefit from Existing Markets

For injectable contraceptives, there are different trends across regions and countries in terms of the overall market. Every country tells its own unique story, and it is critical to understand the big picture as well as regional- and district-level trends. For example, over the past three decades, injectable prevalence in Latin America increased from 3.7 to 9.9 percent and provision shifted dramatically from the private sector (72 percent) to the public sector (63 percent). In Asia, injectable use increased from 9.1 to 19 percent, while the public-private mix largely stayed the same. In sub-Saharan Africa, injectable prevalence increased from 5.1 to 10.3 percent, with the public sector share decreasing slightly

from 72 to 68 percent.ⁱⁱ It is important to consider how the existing market can benefit introduction and scale-up of DMPA-SC as well as how scale-up will impact the market, in any given context. For DMPA-SC, in particular, consider the following questions:

- Is DMPA-SC being introduced in a high-, medium-, or low-injectable prevalence market?
- What percentage do injectables represent in the overall method mix?
- What inequities exist in terms of geography (urban versus rural) and socioeconomic status?
- Is there an existing private sector market for injectables?

Ensure that Coordination for DMPA-SC Includes All Sectors

There is excitement and interest around DMPA-SC among donors, governments, and implementing partners. As governments gain more understanding of the value of this

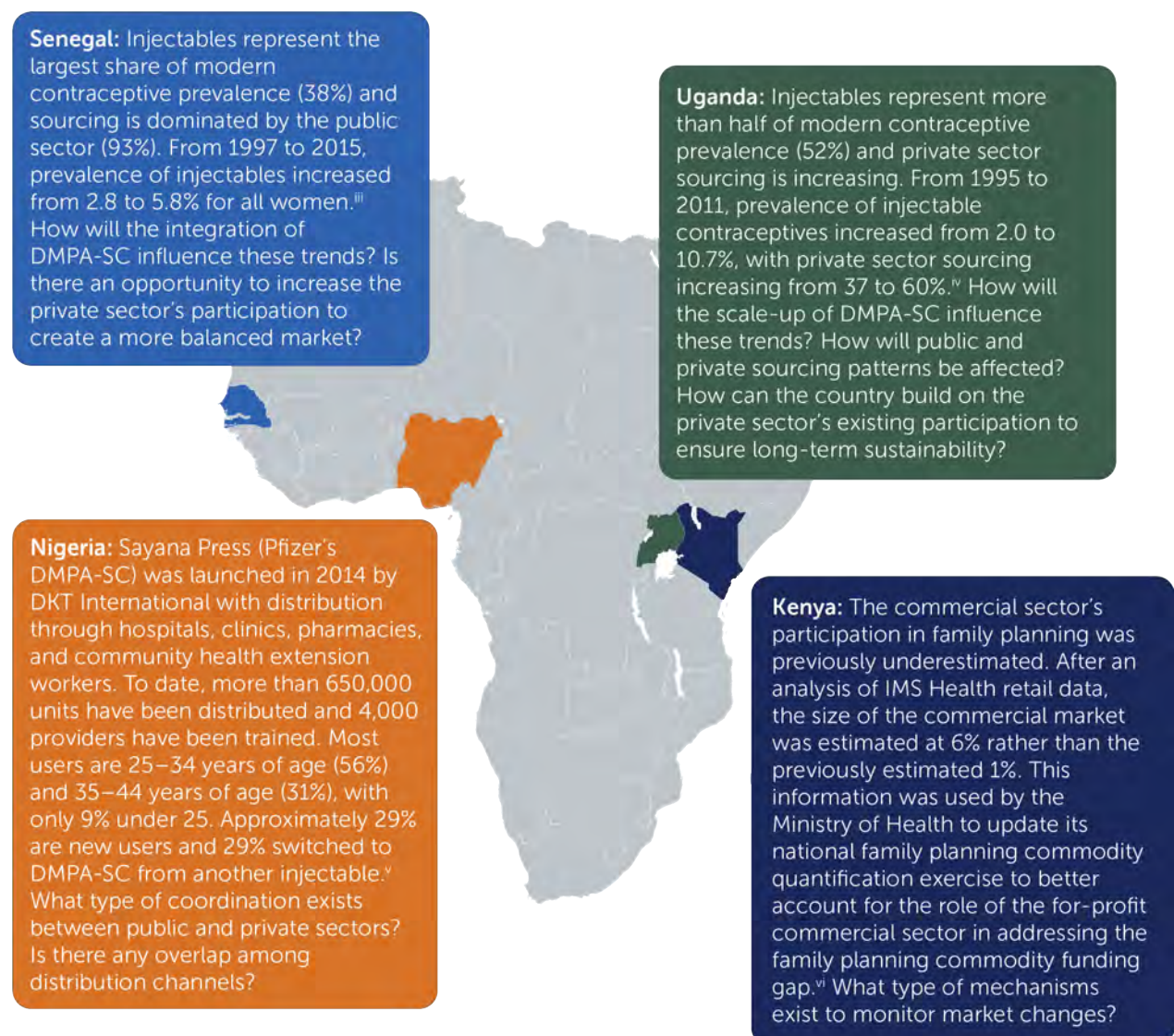
approach, they are increasingly prepared to lead coordination efforts, establish TMA working groups, and convene stakeholders in different forums. There is an opportunity to bring DMPA-SC into these efforts and ensure that efforts are complementary:

- What government agency is best positioned to lead TMA in your country?
- Who are the various actors (such as donors, government, nongovernmental organizations, and the private sector) that should be involved with DMPA-SC's introduction in the short and long term?
- What coordination issues among the public and private sectors should be addressed?

Consider the Private Sector's Potential Role for DMPA-SC

TMA advocacy is deliberate in its efforts to bring the private nonprofit, social marketing, and commercial sector players to the table alongside the public sector. For DMPA-SC, this means having a clear vision for the private sector's role during planning, introduction, and scale-up. It also means knowing whether there will be social marketing and commercial introductions, how those distribution channels and marketing strategies will be different than the public sector, and what policy issues need to be addressed to allow for private sector expansion. In general, the private sector's comparative strengths include increased

Figure 2. Country Examples of TMA Consideration and Potential Actions



access/convenience, establishment of private sector markets, and increased cost-recovery/sustainability. If a social marketing or commercial sector introduction is considered, coordination of public and private sectors should address questions such as:

- Will branding and marketing be differentiated across public and private sectors?
- Is there potential overlap in distribution channels across public and private sectors, such as through community-based distribution?
- What policy issues may affect private sector introduction or roll-out? For example, which providers or service-delivery points can offer the method? What training is required (if any) for community-based distribution?
- How does cost-recovery, pricing, and procurement affect sustainability? Is the product donated or purchased by a social marketing agency?

Ensure Sufficient Mechanisms to Monitor Market Changes in both Public and Private Sectors

TMA stakeholders advocate for better monitoring, reporting, and sharing of market trends and other data across sectors. Yet, government stakeholders often do not have established mechanisms for monitoring product distribution and service delivery by social marketing agencies or nongovernmental organizations. In addition, they have little knowledge of the commercial

sector's family planning data. Given that DMPA-SC is likely to be introduced through multiple channels, it will be important to establish comprehensive monitoring and reporting systems that capture the contribution from all sectors. Questions to ask include:

- What is the current mechanism for family planning reporting and monitoring?
- Does it include all market players such as social marketing and commercial sectors?
- What additional monitoring and market research is needed?

References

ⁱ Palladium. 2016. *Palladium's Total Market Approach – A Pathway for Delivering Health Impact*. Washington, DC: Palladium.

ⁱⁱ SHOPS Plus. n.d. "Private Sector Counts." Available at: <https://data.shopsproject.org/index.html>.

ⁱⁱⁱ Agence Nationale de la Statistique et de la Demographie (ANSD) [Senegal] and ICF. 2016. *Senegal: Enquête Démographique et de Santé Continue (EDS-Continue 2015)*. Rockville, MD: ANSD and ICF.

ⁱⁱⁱⁱ Direction de la Prévision et de la Statistique (DPS) [Senegal] and Macro International, Inc. 1997. *Enquête Démographique et de Santé au Sénégal, 1997*. Calverton, MD: DPS and Macro.

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^{vii} DKT International Nigeria and University of California San Francisco. 2016. *Introducing the Next Generation Injectable in Nigeria*. Abuja, Nigeria: DKT International Nigeria.

^{viii} Palladium. 2016. *Mainstreaming the Commercial Sector into Kenya's Family Planning Market: Trends in Sales of Family Planning Products: An Analysis of IMS Health Retail Audit and ESHE Product Distribution Data*. Nairobi, Kenya: Palladium, Enabling Sustainable Health Equity Family Planning Program.

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