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# Bus Stops, Beauty Parlors, and Bangle Shops

## *Shifting Nepal's Private Condom Distributors Beyond the Urban Comfort Zone*

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## Overview of Nepal

- **Population: 27 Million**
- **Population < 20 Yrs: 50%**
- **Literacy Rate: 65.5 %**
- **Fertility Rate: 3.1**
- **CPR: 48 %**



Source: NDHS, 2006; CIA Factbook



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## HIV/AIDS in Nepal – Populations at Risk

- Nepal has a concentrated epidemic in certain sub groups (e.g. injecting drug users, female sex workers, clients of female sex workers etc.)
- HIV prevalence in some risk groups
  - IDUs-20.3%, FSWs-2.3%, Truckers/Migrant workers <1%
- Transit and migration routes continue to be key high-risk areas



## Private Sector Condom Market in Nepal in 2006

- Existing condom market built with USAID support
  - Overall private sector demand of 18 million condoms annually
  - Over 25 different brands
  - Growing demand for commercial varieties among at-risk groups
- Opportunity to reduce dependency on donated and/or subsidized condoms and move to greater national self-sufficiency
- Most condom distributors focused on urban centers and medical shops for distribution



## Objectives for Extending Reach to Non-Urban Areas

- Expand overall private sector condom market
- Increase contributions of commercial brands to overall market
- Increase condom-selling points outside Kathmandu, with a particular focus along major transit routes and high-risk areas and in non-medical shops
- Leverage commercial sector investment in condom marketing and distribution



## N-MARC's Intervention with the Private Sector

### Micro GDA

- Joint-risk, joint-reward approach
- 1 to 1 matching ratio (or higher ratio favoring USAID)
- Partners responsible for own product procurement
- 3 commercial distributors enrolled, 6 brands

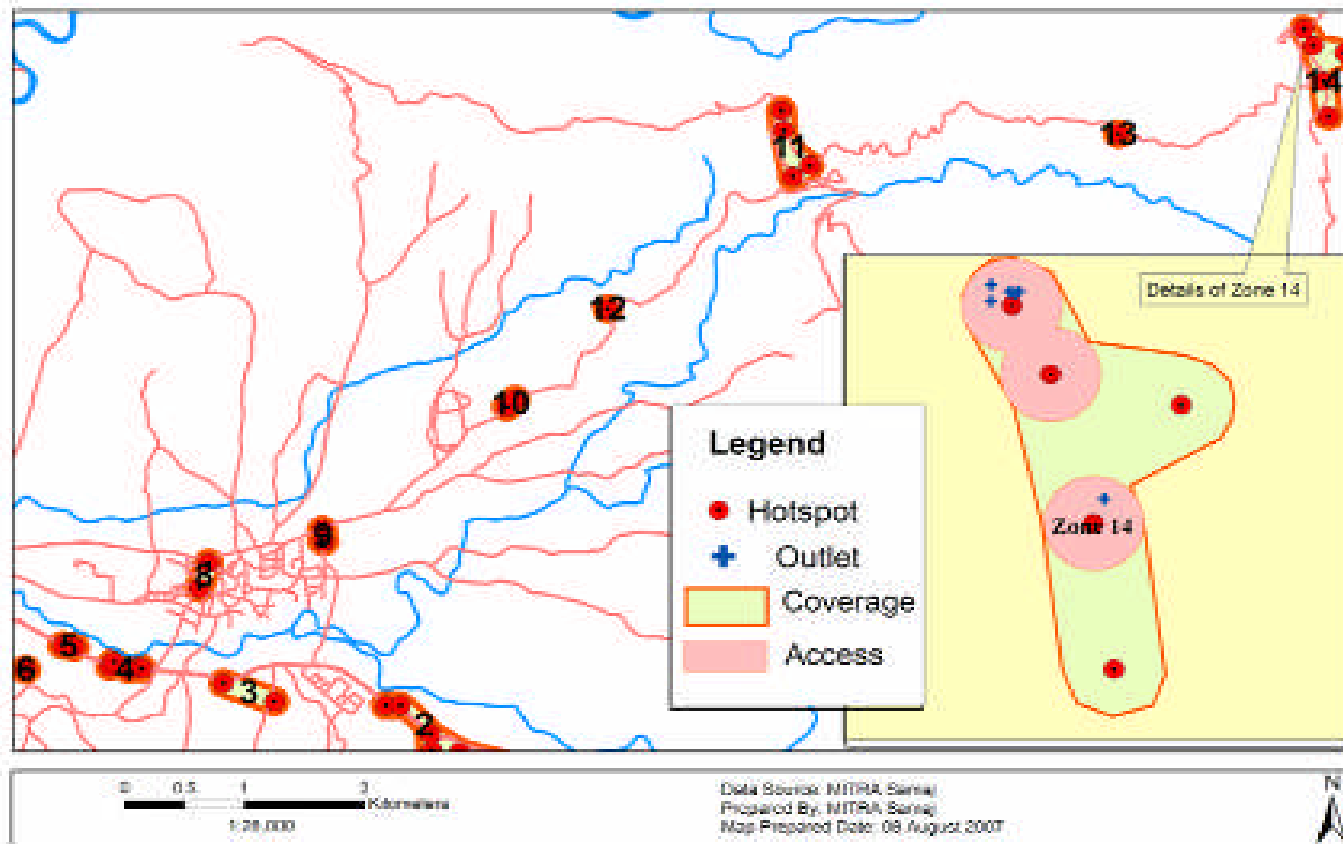
### Technical Assistance

- Developing and refining marketing strategies
- Brand rationalization/new products
- Establishing new distribution systems
- Market intelligence



## Using GIS Mapping for Targeting Marketing & Distribution

- GIS mapping provides evidence-based marketing and distribution efforts within high-risk areas







## Bridging Condom Distributors to Non-Urban Consumers

- Basket-selling approach focused on the highways
  - Targeted distribution partner appointed for opening new outlets along major highway routes

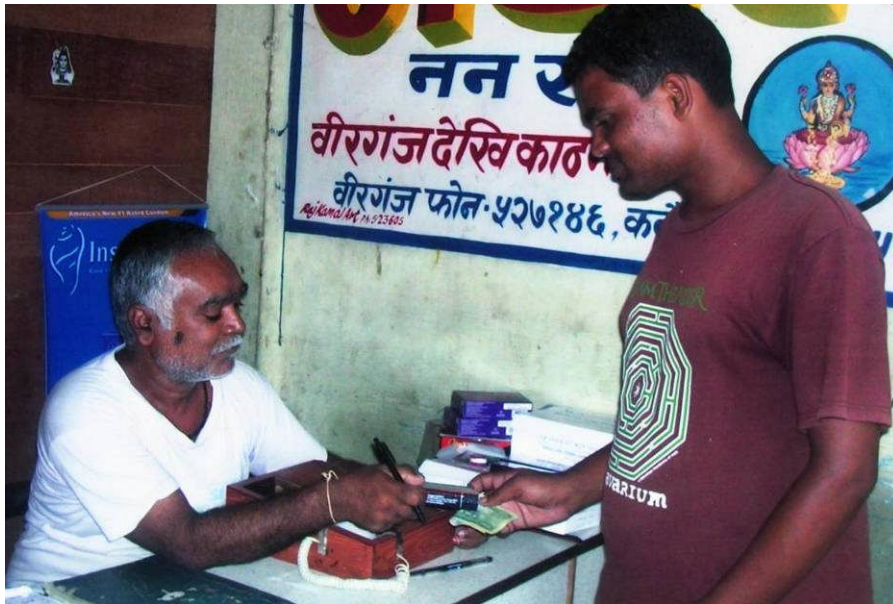




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## Bridging Condom Distributors to Non-Urban Consumers

- Utilization of local NGOs for targeted distribution to at-risk consumers and stocking bus counters





## Bridging Condom Distributors to Non-Urban Consumers

- Establishment of beauty parlor and barber shop condom outlets in high-risk areas





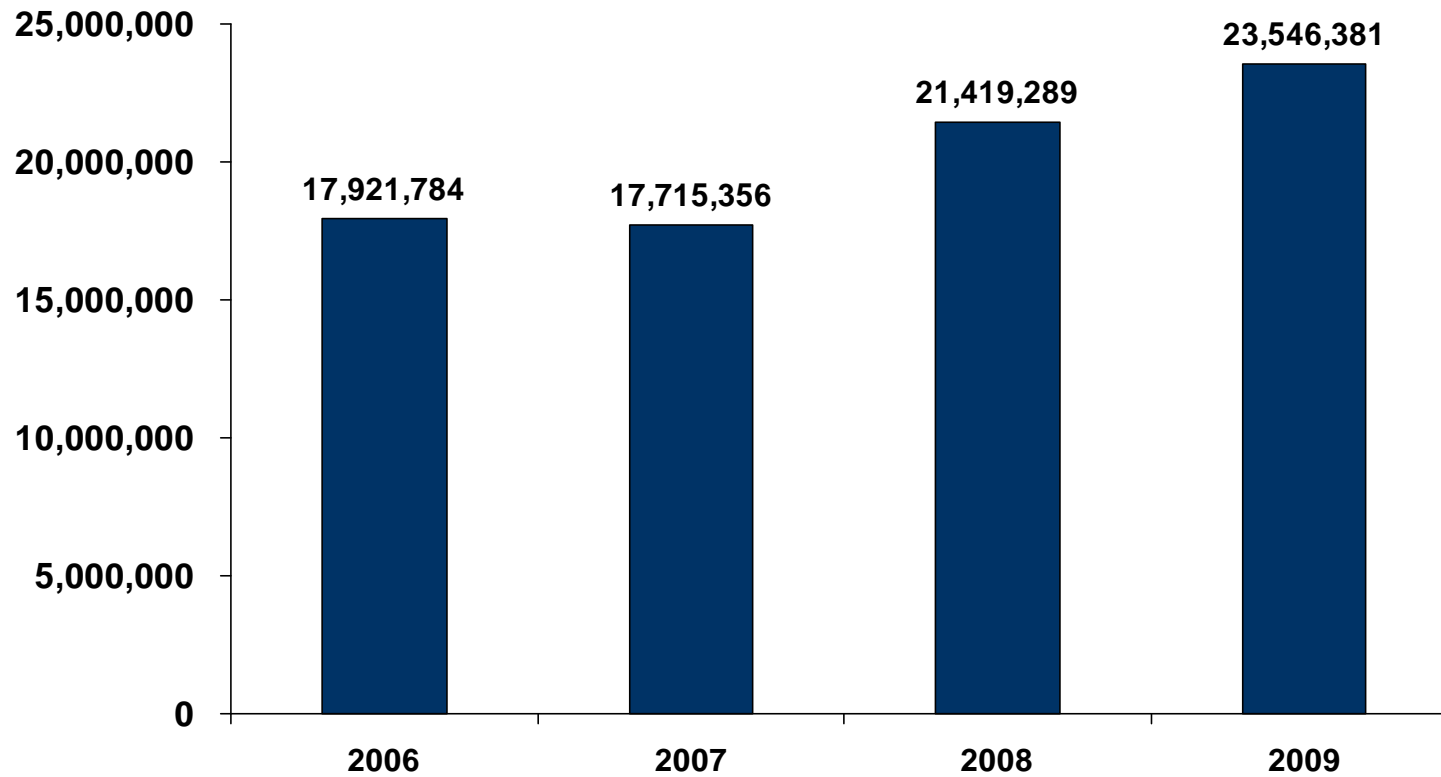
## Bridging Condom Distributors to Non-Urban Consumers

- Using N-MARC's SMO partner, mobile condom kiosks established – selling both subsidized and fully-priced products





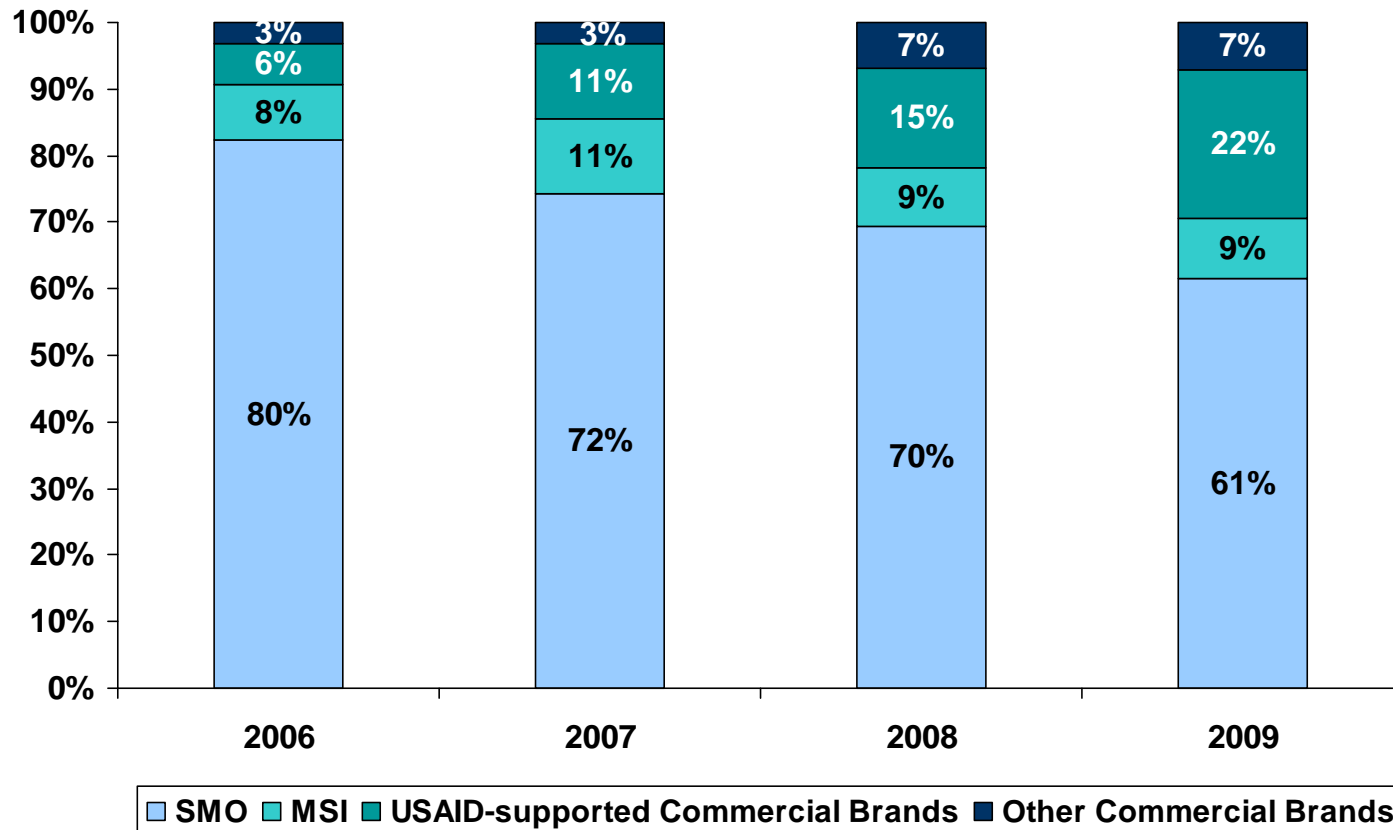
## Overall Condom Market Size (August 1 – July 31)



Source: AC Nielsen, 2009



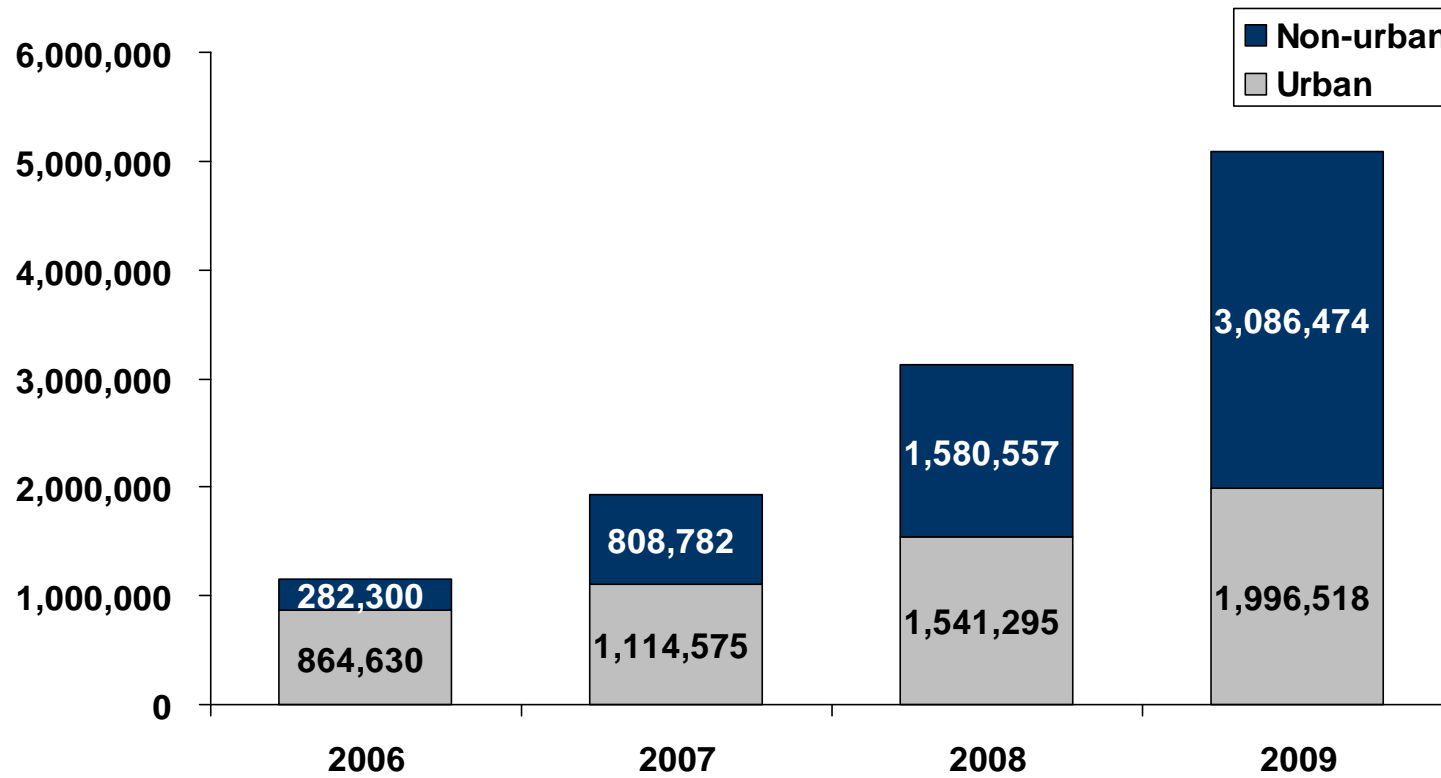
## Market Share, Condoms, by Sector (August 1 – July 31)



Source: AC Nielsen, 2009



## USAID-supported Commercial Market Size (August 1 – July 31)

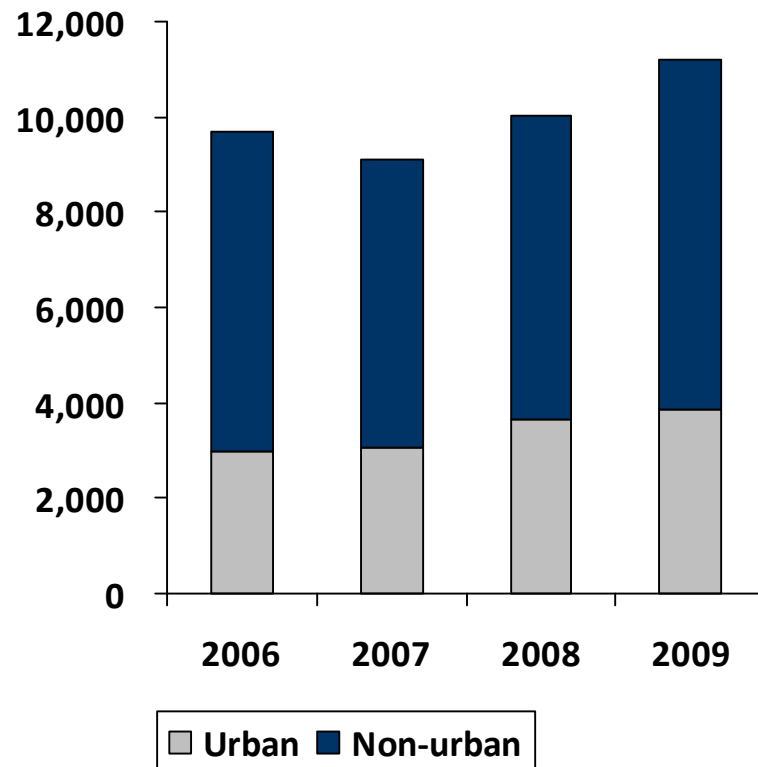


Source: AC Nielsen, 2009

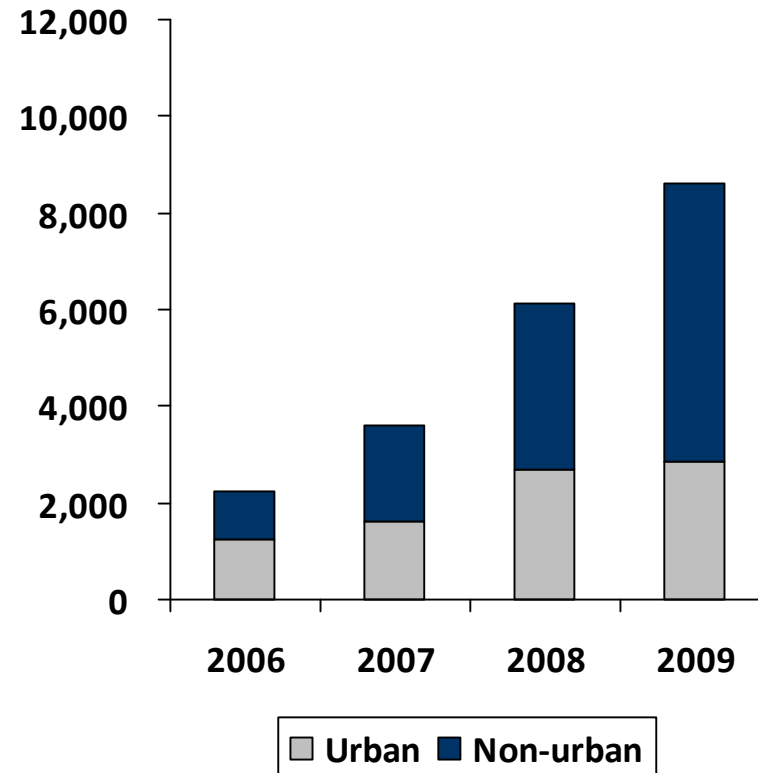


## Condom Coverage, by Geographic Area (August 1 – July 31)

### Number of Any Brand Condom-selling Outlets, Urban vs. Non-Urban



### Number of USG-supported Commercial Condom-selling Outlets, Urban vs. Non-Urban



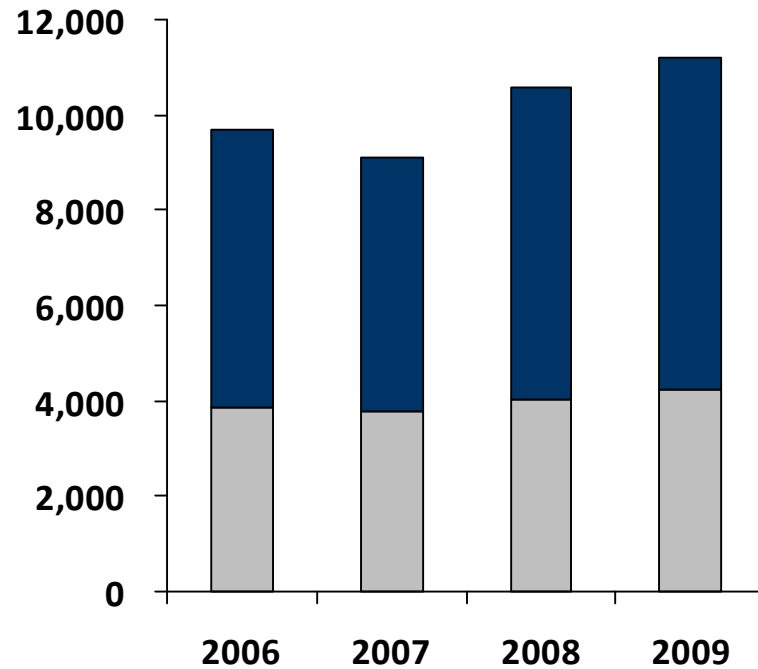
Source: AC Nielsen, 2009



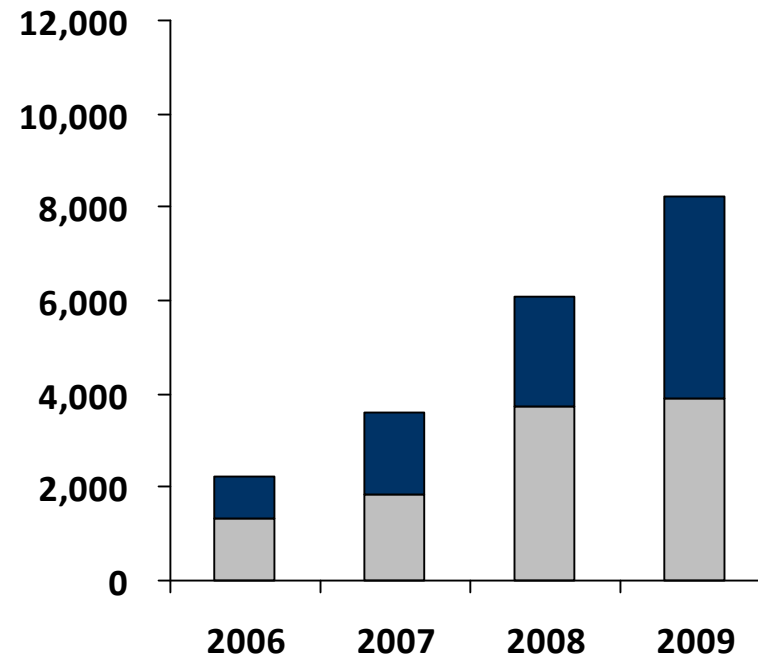


## Condom Coverage, by Outlet Type (August 1 – July 31)

### Number of Any Brand Condom-selling Outlets, Medical/Non-Medical Shop



### Number of USG-supported Commercial Condom-selling Outlets, Medical/Non-Medical Shop



■ Medical Shops ■ Non-Medical Shops

■ Medical Shops ■ Non-Medical Shops

Source: AC Nielsen, 2009



## Leveraging Resources from the Private Sector

*Period: July 22, 2007 – July 31, 2009*

	N-MARC Support (\$)	Partner Investment (\$)	Ratio
<b>Company 1</b>	97,598	528,881	5:1
<b>Company 2</b>	97,594	285,217	3:1
<b>Company 3</b>	50,351	154,052	3:1
<b>TOTAL</b>	<b>245,544</b>	<b>968,151</b>	<b>4:1</b>



## Organizational Transformation within Condom Distributors

- Increased mass media and targeted activities towards at-risk groups
- Establishment of alternative, targeted distribution channels
- Increased CSR activities
  - Company collaboration with PEPSI
  - Active participation on Universal Access for Children Affected by AIDS in Nepal project
- Movement towards establishing national condom quality standards



## Other Innovations in Nepal's Private Sector

### **1<sup>st</sup>** Hormonal Contraceptives Manufactured in Nepal

- Lomus Pharmaceuticals, N-MARC's partner, introduced the first hormonal contraceptives (POP, COC, and ECP) manufactured in Nepal
- Lomus plans to expand manufacturing capacity and pursue WHO pre-qualification





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# Thank You



## For more information

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