FPwatch Key Findings: Multi-Country Results

Tuesday, May 23rd, 2017
11:30am – 1:00pm EST

www.fpwatch.info
Presentation Outline

The FPwatch Project

Brief Overview of Survey Methods

Key Findings from Outlet Surveys
  Drug shops
  Implants
  Community Health Workers

FPwatch data impact
  Where to find reports and datasets
The FPwatch Project
FPwatch Overview

FPwatch produces **standardized evidence** on contraceptive commodity and service markets in 5 priority FP2020 countries

**Why?**
- To generate family planning market evidence
- To make this information available to inform policy and programming
Methods and Study Population

- **Screened**: All potential outlets
- **Interviewed**: Outlets with contraceptives or services available

**What is an outlet?**
- Hospital/Health Center
- Public Health Center
- Health Post
- Community Health Workers
- Not For-Profit Facility
- Private For-Profit Facility
- Pharmacy
- Drug shop
- General Retailer
- Itinerant Drug Vendor
What FPwatch Adds to Contraceptive Market Understanding

Picture of the total market for modern contraceptives (public & private sectors)

FPwatch provides information on:

- Outlets
- Commodities
- Services

complementing other important data sources (eg. DHS, smaller-scale national health surveys, MICS, PMA2020, the SPA, SARA (WHO), SDI (WB) and HMIS)
FP2020 Commitment

Enable 120 million more women and girls to have informed choice and access to information and a range of modern contraceptive methods by 2020.
How can FPwatch data help us reach SDGs and FP2020 objectives?

• FPwatch can help us answer:
  • What roles do the private and public sectors play?
    • Which players have an impact?
    • Which contraceptives are available?
  • To what extent does policy impact the market?
    • How does task sharing affect the availability of specific methods?
  • Where to invest limited resources?
    • Where are people already getting contraceptives?
    • What existing infrastructure can we leverage?
Outlet Survey Results
Contraceptive market composition

Relative distribution of outlet types, among outlets with modern contraceptives* in stock on the day of the survey

* This excludes outlets that had only male/female condoms available and no other modern method

**Ethiopia**
- **N = 2,080**
- Private: 40%
- Public: 60%

**Nigeria**
- **N = 2,245**
- Private: 85%
- Public: 15%

**Myanmar**
- **N = 6,680**
- Private Medical: 56%
- Private Other: 44%

**Kinshasa**
- **N=443**
- Private: 86%
- Public: 14%

**DRC**
- **N=350**
- Private: 72%
- NFP: 2%

**Katanga**
- **N=350**
- Private: 29%
- Public: 29%

**Uttar Pradesh**
- **N = 2,358**
- Private Medical: 17%
- Private Other: <1%
- Public: 8%

**India**
- Bihar
- **N = 1,237**
- Private Medical: 28%
- Private Other: 8%
- Public: 65%

**Private Health Facility**
- **Community Health Worker/Sub-centre/Health Post**
- **NGO**
- **Drug Shop**
- **Other medical provider**
- **General Retailer**
In some countries, drug shops account for a big part of the market, but...
Contraceptive market composition

Relative distribution of outlet types, among outlets with modern contraceptives* in stock on the day of the survey

Nigeria
N = 2,245

Kinshasa
N = 443

DRC

Katanga
N = 350

Drug shops: 79%

Higher-Level Health Facility

Community Health Worker/Sub-centre/Health Post

NGO

Private Health Facility

Pharmacy/Chemist

Drug Shop

Other medical provider

General Retailer

* This excludes outlets that had only male/female condoms available and no other modern method
Diversity in Available Modern Contraceptive Commodities

Among screened outlets, by outlet type, including condoms
Contraceptive Market Share
As a % of total volume converted to CYP within drug shops, by contraceptive method and outlet type

- Female sterilization
- Male sterilization
- IUDs
- Implants
- Injectables
- Emergency contraceptives
- Oral contraceptives
- CycleBeads
- Female condoms
- Male condoms

*PPMV: proprietary patent medicine vendor
Missed opportunity?

Women are more likely to find contraceptives available at drug shops compared to other outlets …

but, the range of methods sold at drug shops is limited and dominated by condoms
DRC: response to FPwatch data

- CTMP and MoH are working to support drug shops to improve access to a range of contraceptives.

- ASF is training drug shop providers on FP counseling and equipping them to provide youth friendly services.
Nigeria: response to FPwatch data

- FP partners are working to expand the method mix in PPMVs (drug shops) and train staff on FP counseling
- The Pharmacist Council of Nigeria will include EC in the PPMV training curriculum to help them provide more comprehensive counseling
CHWs & Health Posts – an opportunity for rural access to contraceptives
Contraceptive market composition

Relative distribution of outlet types, among outlets with modern contraceptives* in stock on the day of the survey

* This excludes outlets that had only male/female condoms available and no other modern method
Contraceptive Market Share
As a % of total volume of CYP within outlet, by contraceptive method and outlet type

<table>
<thead>
<tr>
<th>Contraceptive Method</th>
<th>HEW/Health Post</th>
<th>SC/ANM/ASHA Uttar Pradesh</th>
<th>SC/ANM/ASHA Bihar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female sterilization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male sterilization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IUDs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Injectables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency contraceptives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oral contraceptives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CycleBeads</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female condoms</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male condoms</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: HEW = Health extension worker; SC = Sub-centre; ANM = auxiliary nurse midwife; ASHA = Accredited social health activist
Task sharing in Ethiopia can serve as a model

- In Ethiopia HEWs have a huge impact on market share because implants are a part of their method mix
What does this mean for India?

- Community level services can help India transition from a focus on sterilization to a broader method mix
How does availability impact choice?
Availability of Selected Long-Acting Contraceptives
Among screened outlets, by outlet type

![Bar chart showing availability of contraceptives by type and location.]

- Public Total
- Private Total
- Public Total
- Private Total
- Public Total
- Private Total
- Public Total
- Private Total

Locations:
- Ethiopia
- Nigeria
- Kinshasa
- DRC
- Katanga

- Implants
- IUDs
Available Modern Contraceptive Services/Procedures –
Among screened outlets, by outlet type

<table>
<thead>
<tr>
<th></th>
<th>Ethiopia</th>
<th>Nigeria</th>
<th>Kinshasa</th>
<th>DRC</th>
<th>Katanga</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Total</td>
<td>Implantaion service</td>
<td>IUD insertion service</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Orange bars represent Implant insertion service
- Blue bars represent IUD insertion service
Contraceptive Market Share
As a % of total volume of CYP, by contraceptive method and outlet type

- **Implants**
- **Ethiopia**
- **Nigeria**
- **Kinshasa**
- **DRC**
- **Katanga**

- **Public Total**
- **Private Total**

- **Male condoms**
- **Female condoms**
- **Emergency contraceptives**
- **Injectables**
- **Male Sterilization**
- **Female sterilization**
- **CycleBeads**
- **Implants**
- **Oral contraceptives**
- **IUDs**
With method choice, implants are popular

- Despite low levels of availability, implants command an important share of the market wherever they are in stock.
Myanmar Private Market Share and Availability of Selected Contraceptives

Market share as a % of total volume of CYP within outlet, by contraceptive method and outlet type

Availability among screened outlets, by outlet type

- Female sterilization
- Male sterilization
- IUDs
- Implants
- Injectables
- Emergency contraceptives
- Oral contraceptives
- CycleBeads
- Female condoms
- Male condoms

Myanmar
Myanmar: an opportunity to make LARCs available in the private sector

- Despite recent efforts to scale up access to LARCs in Myanmar, injections & OCs still dominate the private sector market.
Action taken as a result of FPwatch
Programmatic work inspired by FPwatch

Identification of market successes and failures helps to refine our interventions & total market approach

- Ethiopia: using brand level data to fill gaps in the contraceptive market
- Myanmar: a report card for franchise clinics helping assess contraceptive provision and improve services
- DRC: training drug shop providers in FP counseling and youth friendly services
FPwatch policy advocacy

- **Nigeria**: advocacy for Emergency Contraception
  - National guidelines on EC
  - Inclusion in the Essential Medicines list
  - EC in the national training for PPMVs

- **Ethiopia**: strategic plan for public-private-partnership

- **DRC**: commitments by the MoH & CTMP to partner with drug shops to allow access to the full range of methods
How does FPwatch inform strategies to achieve FP2020 goals?

- **Drug shops** - *large proportion of market + first-stop-shop:*
  - Improve range and supply of contraceptives to leverage this infrastructure and health seeking behavior

- **CHWs** - *an opportunity for rural contraceptive access:*
  - Improve method choice by task-shifting injectables and implants

- **Implants** - *huge market potential:*
  - Improve method mix to include implants
Please use our data!

- Country reports
  - All indicators (price, stock-out, service availability, readiness, etc.)

- Additional analyses:
  - Misoprostol data
  - Pregnancy Test Kit data
  - Information on all brands of contraceptives

- Datasets for all FPwatch countries (request form)

fpwatch.info
Acknowledgements

- BMGF & 3MDG FUND
- PSI Ethiopia, India & Myanmar
- ASF (DRC) & SFH (Nigeria)
- Fieldwork Teams
- ACT/FPwatch Team
- Technical Advisory Group
- Dr. Bryan Shaw, Coley Gray, Sarah Thurston
What do you think?

• Are any of these findings surprising?

• How is FPwatch data relevant for your programs?

• In what parts of the market should we be investing resources?
Thank You!

fpwatch.info
Questions