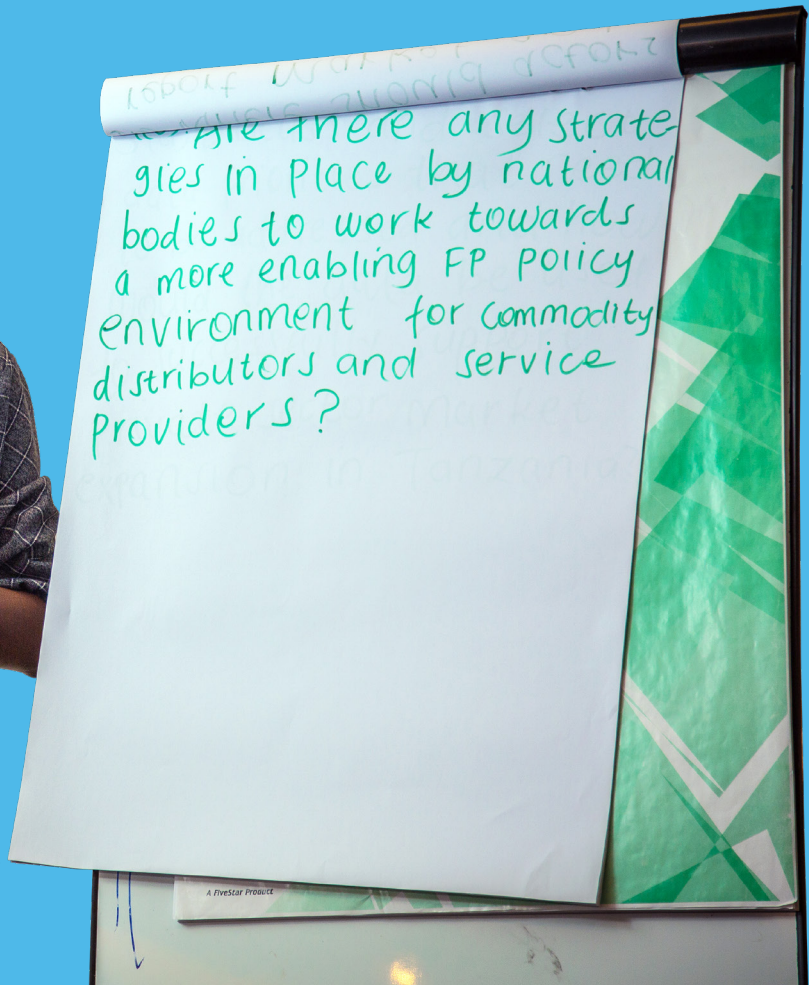


# Implementing a Total Market Approach for Family Planning Products

Lessons from Tanzania



The SHOPS Plus project supported its partners in Tanzania in adopting a total market approach to strengthen the country's family planning market. This case study documents the strategy that the project used to build capacity among public and private sector stakeholders to effectively coordinate at national and subnational levels with the goal of strengthening markets. It highlights lessons and implementation tips that other countries can apply to pursue similar efforts in their own family planning programs.

As donors and country governments seek to improve health and development outcomes, many are increasingly turning to the private sector. The United States Agency for International Development's (USAID's) *Private Sector Engagement Policy* calls the private sector “one of the most powerful forces for lifting lives [and] strengthening communities” (USAID 2018). In many countries, these efforts are hindered by the way in which the markets for health products have developed. Several low- and middle-income countries have relied on commodity donations from international donors, which are typically channeled through the public sector, NGOs, and social marketing organizations. This approach has been successful and has greatly increased access. However, without engagement of the commercial private sector, there is the potential for missed opportunities for additional growth in the market, reaching new clients, and future sustainability.

Over the past several years, USAID, the United Nations Population Fund (UNFPA), and other international donors have increasingly recognized the need to incorporate private sector voices in commodity programming, especially for forecasting, procurement, and distribution. This recognition has helped generate momentum behind the use of a total market approach (TMA). A TMA aims to strengthen the stewardship of markets for family planning or other products and services by breaking down silos between the public and private sectors. The goal is to generate a more comprehensive understanding of the market and design programs that better reach and serve those in need. It considers all free, subsidized, and commercial products and services to increase access more equitably and sustainably for all segments of users (Box 1). This approach focuses on multisectoral coordination and dialogue and emphasizes policy interventions.

## Box 1. TMA core principles

A TMA should:

- Emphasize stewardship and coordination, ideally led by the government, to increase equitable and sustained access.
- Use supply- and demand-side data to segment markets and understand who is and who is not being reached.
- Coordinate government and donor interventions to create space for private investments.

Implementing a TMA requires stakeholders to change their perspectives and behaviors to create an enabling environment for sustained, collaborative coordination between the public and private sectors. Many governments have limited experience doing this, have had limited incentives to do so, and face multiple challenges, such as competing priorities on the part of governments, donors, and market actors. However, as the ultimate stewards of the health system, they have the convening power necessary to lend legitimacy to any effort. Through their policy and strategic frameworks, they can articulate a vision and goals that can be used to orient the broader range of stakeholders. More importantly, they have substantial platforms at all levels of the health system—national and subnational—where they can convene and engage with the private sector. The experience of the USAID-funded Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project in Tanzania demonstrates how donors and implementing partners can work to address these challenges through a TMA. This brief describes how SHOPS Plus supported government partners in Tanzania to improve planning and coordination to better steward family planning markets.\* This example can serve as a potential model that other missions, donors, or government bodies can replicate to facilitate the implementation of a TMA in their commodity programs.

\* Family planning markets typically include condoms (as was the case in this Tanzania case study), and donors for HIV programs have an important role to play in condom markets.

# Market context

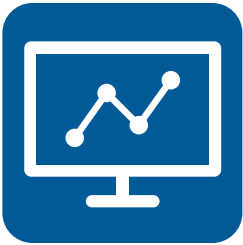
USAID/Tanzania first approached SHOPS Plus in 2017 with a request to facilitate a TMA to strengthen the country's family planning market. At the time, several donors—including USAID and the Bill and Melinda Gates Foundation—had recently funded total market assessments of Tanzania's family planning markets (Baleva, Broxton, and Richers 2016; Mann Global Health 2017; UNFPA 2017). These assessments highlighted the predominance of UNFPA donations and the limited presence of private commercial brands for most family planning products. Assessments found that donors accounted for the vast majority of commodity funding (92 percent of condoms distributed in 2016). These commodities were largely distributed through the public sector for free or sold by social marketing organizations at subsidized prices. Moreover, the assessments found that the large-scale presence of these products undercut the entrance of commercial brands and were not adequately reaching populations with unmet need (UNFPA 2017). For example, 80 percent of the wealthiest and 80 percent of urban populations—the prime target users for commercial condom brands—were already using a subsidized product, according to the 2015–16 Demographic and Health Survey results (Mann Global Health 2017). By 2017, USAID had begun to shift its social marketing portfolio and supported T-MARC Tanzania, the country's only social marketing organization, to embrace a more self-reliant model. DKT had also entered the Tanzanian market, operating on a fully sustainable basis, and other NGOs and social marketing organizations interviewed by assessment teams indicated plans to pursue similar self-sufficiency strategies (Mann Global Health 2017).

These findings raised several potential concerns for Tanzanian stakeholders: Given US administration funding priorities, would recent funding constraints at UNFPA impair stakeholders' ability to continue sourcing and supplying adequate amounts of commodities as family planning use continued to increase? Could resources that support commodity programs be better targeted and repurposed to reach those facing financial barriers? Would supplies of affordable, quality products in the private sector be disrupted by the anticipated transitions in social marketing programs? The convergence of these concerns raised the urgency of taking a more strategic, intentional approach to stewarding the entire family planning market to sustain current levels of use and support continued growth. USAID/Tanzania engaged the SHOPS Plus project to support a TMA to achieve this end.

# Strategy

The overall goals of the SHOPS Plus support of a TMA were to strengthen the government’s stewardship capacity, improve the targeting of donated condoms and other family planning commodities, and create space for the entry and growth of private sector products. To achieve the coordination needed to implement a TMA, the project developed a four-pronged strategy (Figure 1).

**Figure 1. Strategy to implement a total market approach**



Align market actors around the most pressing market challenges.



Enable total market approach champions in the government.



Create a comprehensive policy framework supportive of a total market approach.



Strengthen mechanisms for cross-sectoral collaboration.

To implement this strategy effectively, the project began by developing a politically informed understanding of the market (Box 2). Who were the key influencers? What were their reactions to the previous assessment findings and recommendations? And how likely would they be to support or oppose a TMA effort? To answer these questions, SHOPS Plus consulted with key leaders and technical experts from the public sector, private sector, and development partners. Beyond helping to identify the appropriate government actors to champion these efforts, the initial consultations revealed that many relevant stakeholders had never heard of a TMA or misunderstood core concepts. They also demonstrated a need for additional market data and insights that would need to be addressed.

## Box 2. A politically informed approach with champions

Decisions about how government resources are spent and whom they benefit are inherently political in nature. Reallocating those resources—as a TMA would potentially do—involves trade-offs that affect various population segments differently. It is important to understand how key decision makers understand and value those trade-offs to demonstrate how proposed changes would address their concerns and gain their buy-in. At a minimum, TMA efforts need to identify:

- Who makes the decisions about family planning resource programming?
- How do they view the market's performance and the private sector's role?
- Would they support a TMA?

Knowing the answers to these questions helped SHOPS Plus identify the Reproductive and Child Health Section (RCHS), National AIDS Control Programme (NACP), Tanzania Commission for AIDS (TACAIDS), and the President's Office of Regional Administration and Local Government as key champions that would need to convene the relevant market actors and lead efforts to rethink how resources are programmed.



*Dr. Jarrie Kabba-Kebbay of UNFPA speaks at a consultative meeting held in 2019. Stakeholders from the public and private sectors gathered in Dar es Salaam to discuss how to best apply a total market approach in markets for family planning products.*

Photo: DDC International/Sama Jahanpour

## Align market actors around the most pressing challenges

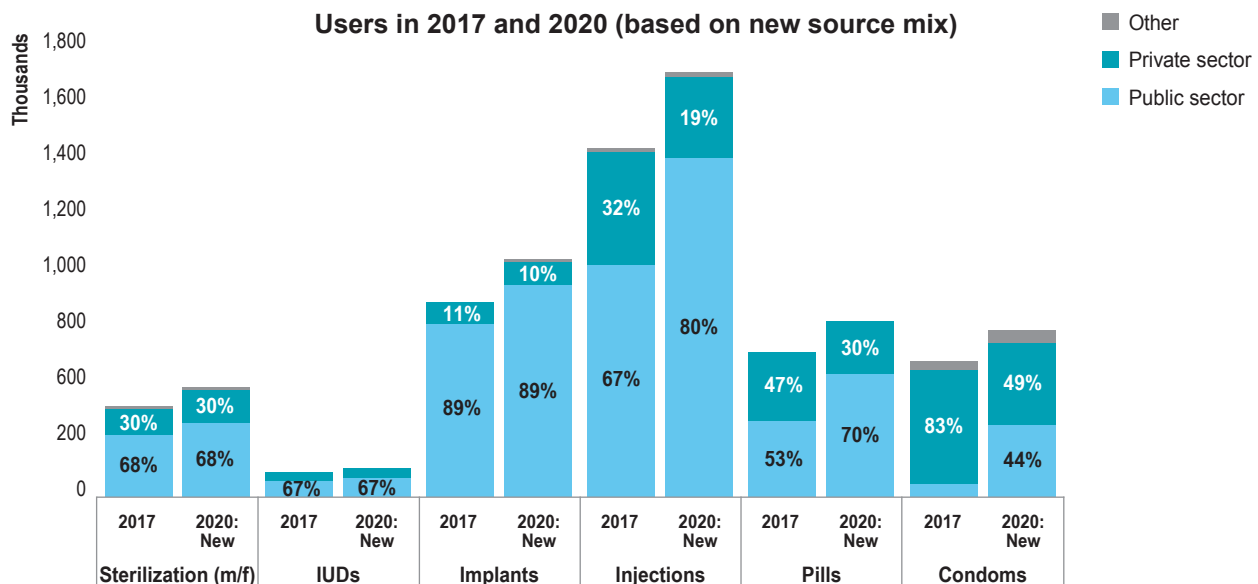
SHOPS Plus sought to align market actors—TMA champions, other donors, and implementing partners—around the most pressing challenges that the family planning market faced: improving the targeting of government and donor subsidies for condoms used in HIV prevention programs and strengthening contraceptive security. Although several donors had funded recent assessments, it became clear that several market actors were not aware of their findings or recommendations due to a lack of dissemination and follow-up. This posed a problem: without a common understanding of how existing practices contributed to market gaps, it would be challenging to explain why anything needed to change. In addition, various stakeholders had different priorities. For example, UNFPA, USAID, the Gates Foundation, and others had aligned behind the need for a TMA to sustain use, whereas the U.K. Department for International Development and the Global Fund initially prioritized equity and access concerns. This difference meant that donor-funded initiatives would potentially compete with each other. The TMA effort sought to increase space for the private sector through improved targeting of free commodities, and the U.K. Department for International Development and the Global Fund emphasized widespread free distribution. Creating a common understanding of how a TMA could help increase access and equity was the first step toward promoting effective coordination. SHOPS Plus completed several activities to achieve this common understanding:

- **Conducted one-on-one meetings to sensitize market actors**—including government stewards, donors, social marketing organizations, and leading NGOs active in the family planning market—to previous market assessments and solicit areas in which they agreed or disagreed with the findings. As part of this initial outreach, project staff used market data to model several scenarios that demonstrated the additional burden that would fall on public resources if the private sector was not better supported to participate in the market. This messaging strongly resonated with public stewards and helped motivate them to take on leadership roles.
- **Implemented rapid data collection efforts** to address concerns and fill knowledge gaps that were raised in the initial one-on-one meetings. These efforts included a family planning market landscape to better understand—among other concerns—potential access challenges related to planned phase-outs of social marketing brands for oral and injectable contraceptives (see Box 3); a family planning market segmentation exercise to better understand current use, unmet need, and sourcing patterns; a condom retail audit to better identify the availability and pricing of social marketing and commercial brands; and qualitative research to inform pricing, branding, and distribution plans for condoms.
- **Supported government TMA champions** to organize several meetings to bring together public, private, and donor stakeholders to review data and discuss

its implications for the market (Box 4). Inclusion of private sector actors, especially commercial importers and distributors, in these discussions helped the government and donors better understand the challenges from their perspective and highlighted policy reforms that the government could make to incentivize increased private sector activity in the market. To motivate the private sector to participate in these conversations, SHOPS Plus used the meetings to share updated, timely market data relevant to their core businesses and focused agenda topics on issues most relevant to their immediate concerns.

### Box 3. Using data to advocate for a total market approach

SHOPS Plus used modeling data—such as the scenario below—to illustrate how existing trends in population growth, sourcing, and supplies could add to the already high burden on government and donor resources. This illustration emphasized the need to leverage untapped resources in the private sector through a TMA.



Source: Family Planning Market Analyzer

### Box 4. Using data to build consensus

Market data can help stakeholders understand the specific problem areas to address. However, market stewards will likely need support to see how TMA principles can lead to interventions that fix these problem areas. This can help move a TMA from broad policy statements to action. For example, the family planning market landscape highlighted that half of wealthy contraceptive users rely on public sources, a potential opportunity for private brands to increase their presence in the market.



Through these efforts, stakeholders reached consensus on the key market gaps related to contraceptive security and resource targeting and understood how current practices contributed to them. This built recognition of the need to increase the involvement of the private sector to introduce new brands and new methods—and created momentum for the TMA stewards to begin developing a TMA implementation plan.

## Enable total market approach champions in the government

Once stakeholders agreed on the market gaps, SHOPS Plus set out to support the newly identified TMA champions. The previous assessments and SHOPS Plus's initial scoping work had found that many relevant stakeholders had not been aware of a TMA or differed in their understanding of what such an approach meant. SHOPS Plus set out to help champions facilitate a common understanding of what they wanted to achieve through a TMA. These efforts sought to:

- **Establish TMA champions as credible stewards.** With RCHS, NACP, and TACAIDS on board as TMA champions leading efforts to better steward the markets, SHOPS Plus and UNFPA provided needed support to convene a national consultative meeting focused on the condom market. The TMA champions used this meeting to lead discussions on potential public and private strategies for distributing condoms and improving targeting of free commodities. The discussions resulted in a revised distribution plan for Global Fund-donated condoms that created space for more robust private sector participation in the market and established the credibility of the champions' willingness to make needed changes.
- **Align donors behind the TMA champions.** Given UNFPA's and the Global Fund's importance to the family planning market, their support was crucial. The urgency of achieving their support was illustrated in December 2017 when the Global Fund announced a new donation of 500 million free condoms. While condoms were not the only commodity market that the TMA effort sought to strengthen, the timing of the donation presented an opportunity to mobilize stakeholders at the onset of SHOPS Plus's work. Social enterprises and other private sector actors expressed concern that this donation—if it were as widely distributed as past donations had been—would continue to crowd them out of the market. In response, and to set the stage for broader interventions, SHOPS Plus organized a series of meetings with donors. The project identified areas where various donor priorities overlapped and could support a TMA, as well as areas where there were potential conflicts that would need to be mitigated, such as those over the efforts to prioritize sustained use rather than equity and access. This work helped bring on UNFPA as a core partner in convening government and implementing partners to support a TMA.

- **Create tools and resources for government managers.** SHOPS Plus developed a series of tools and resources to guide the efforts of TMA champions. The tools included data visualizations, job aids, and action plan templates. The resources included fact sheets, which summarized findings from various assessments and analyses on the state of the market, and advocacy sheets, which presented principles of a total market approach and argued for its application to address market gaps. The project worked with the government TMA champions and the President’s Office of Regional Administration and Local Government to facilitate a series of national and subnational workshops that would help government staff understand how to use the tools and resources to develop, implement, and monitor TMA action plans.

This work helped improve the stewardship capacity of the government TMA champions. It facilitated a common language that diverse stakeholders could use to improve communication. It also resulted in concrete action plans that district-level stakeholders could take to increase private sector engagement in their family planning programs and tools to help government stewards at all levels of the health system.

## Create a comprehensive policy framework supportive of a total market approach

TMA champions could not be in every room where decisions that affected family planning markets were made. To promote the inclusion of TMA principles—namely, the targeting of limited government and donor resources at those in most need and the proactive engagement of a broad range of private actors—in relevant health programs, champions needed to embed TMA principles throughout the entire policy framework that governed the markets. This would (1) ensure that decision makers had consistent access to guidance and (2) help make the approach a routine practice for policy makers.

To assist in this effort, SHOPS Plus staff identified all the relevant service delivery and commodity distribution-related policies and guidelines that shaped the family planning market, and when they were due for review. The project learned which policies would be updated during the period of implementation, when the formal review process would begin, and which organizations would spearhead the effort. SHOPS Plus worked with the TMA champions to use this information to create a comprehensive advocacy calendar and began building the necessary channels to ensure that TMA principles and strategies were included. In some cases, SHOPS Plus representatives already sat on the relevant technical working groups; in others, the government TMA champions were already actively involved in the policy process. Once TMA advocates—whether SHOPS Plus or public sector staff—had gained a seat at all the right tables, they leveraged available market research and modeling tools to craft advocacy messages that illustrated the potential benefit of adopting a TMA and expanding the commercial private sector’s involvement (Box 5).

## Box 5. Tools to support TMA advocacy and policy development

Donor-funded projects have created several tools that can be used to advocate for and support TMA efforts:

- [Private Sector Counts](#) uses Demographic and Health Survey data to illustrate where women currently access their family planning methods
- [Family Planning Market Analyzer](#) uses Demographic and Health Survey and population data to model different changes in family planning markets and highlights implications for commodity supply and human resource requirements
- [Reproductive Health Supplies Visualizer](#) tracks and displays the supply of donated family planning commodities to individual countries
- [Commodity Gap Analysis](#) provides country-level data on current spending, users, consumption quantities, costs, and gaps of various family planning methods

TMA champions generated momentum for policy changes. After stakeholders first agreed to incorporate TMA principles throughout the National Multi-sectoral Condom Strategy, TMA advocates could point to the strategy document as a successful precedent for including TMA considerations in other documents. Through ad hoc reviews and formal participation in the policy development process, government stakeholders incorporated TMA principles, private sector considerations, and opportunities for mobilizing private financial and non-financial resources into eight policy documents and plans:

- *The National Multisectoral Condom Strategy (2019–2023)*
- *Tanzania National Family Planning Costed Implementation Plan (2019–2023)*
- *Tanzania National Multisectoral Strategic Framework for HIV and AIDS 2018/19 to 2022/23*
- Draft *One Plan III*—the country’s overarching strategy for reproductive, maternal, neonatal, adolescent, and child health
- Draft *Health Sector Strategic Plan V*
- Draft *National Family Planning Guidelines and Standards*
- Draft *RMNCAH Guidelines to COVID-19 Response*
- RCHS’s quantification forecast for 2020 to 2022

## Strengthen mechanisms for routine cross-sectoral collaboration

Following the success of the first national consultative meeting for condom programming, SHOPS Plus sought to strengthen mechanisms for routine cross-sectoral collaboration. These efforts were intended to increase the frequency and improve the ability of TMA champions and government program managers to serve as market stewards, generate more support of the effort, and further build the credibility of the TMA initiative among other public and private sector stakeholders, donors, and implementing partners.



---

*Assessments of Tanzania's family planning markets found that commodities were largely distributed through the public sector for free or sold by social marketing organizations at subsidized prices. The large-scale presence of these products undercut the entrance of commercial brands and were not adequately reaching populations with unmet need.*

To those ends, stakeholders created two new platforms—the Condom Taskforce and the National TMA Forum, which aimed to elevate TMA on the national agenda. The Condom Taskforce sought to ensure that the initial reforms put forward to strengthen the condom market as a result of these efforts continued moving forward. The National TMA Forum sought to broaden and institutionalize these efforts by bringing public and private sector stakeholders together on a regular basis to review market performance, solve market challenges, and hold each other accountable to the national TMA action plans. Beyond these new platforms, SHOPS Plus worked to integrate private sector representatives into existing national coordination mechanisms: the Family Planning Technical Working Group, the HIV Prevention Technical Working Group, and the RCHS Annual Quantification and Supply Forecast Meetings. This helped ensure that private sector voices—and private sector data—were available to policy makers so that they had a more complete understanding of the family planning markets and could make better informed plans and strategies.

As a result, TMA champions in the government have taken ownership of the TMA agenda and—through the President's Office of Regional Administration and Local Government—have started devolving cross-sectoral collaboration mechanisms to the subnational level. This will ensure that policies and programs that incorporate the private sector's voice and reflect TMA principles move from paper to practice.

# Outcomes and reflections

SHOPS Plus implemented its strategy over a three-year period in Tanzania. This has helped strengthen family planning markets, making them more sustainable and efficient in many ways. Key results include:

- Successfully advocated to the Global Fund to reduce its allocations for subsidized and free condoms, creating an opportunity for the commercial market to expand
- Created space for the two main importers of commercial condoms in the country to increase their annual supply from 2.5 million to 5.5 million between 2017 and 2019
- Facilitated market conditions that supported a local private social enterprise to introduce a new emergency contraceptive product priced at a level to support its continued supply without donor funding
- Supported a private importer to develop a go-to-market approach for a new commercial injectable contraceptive product

The SHOPS Plus experience in Tanzania highlights the ways in which stakeholders can come together to implement a TMA. The project's strategy illustrates how aligning key stakeholders to a common understanding of key challenges in the market; enabling TMA champions to better steward the market; embedding TMA principles consistently, comprehensively, and clearly into all relevant policies; and fostering improved coordination across sectors can successfully put TMA concepts into practice.



*A family planning counseling session at Massana Hospital.*

Photo:  
DDC International/  
Sama Jahanpour

---

## References

Baleva, J., C. Broxton, and V. Richers. 2016. *Tanzania Social/Total Market Landscaping Analysis*. Washington, DC: USAID.

Mann Global Health. 2017. *Tanzania Case Study*. Washington, DC: Mann Global Health.

SHOPS Plus. 2020. *Family Planning Market Analyzer*. Funded by USAID. <https://fpmarketanalyzer.org>.

UNFPA. 2017. *Tanzania Total Market Approach for Family Planning Study Final Report*. Dar es Salaam: UNFPA.

USAID. 2018. *Private Sector Engagement Policy*. Washington, DC: USAID.

---

## Recommended citation

Callahan, Sean, Nicole Kapesi, Maureen Ogada-Ndekana, and Françoise Armand. 2021. *Implementing a Total Market Approach for Family Planning Products: Lessons from Tanzania*. Rockville, MD: Sustaining Health Outcomes through the Private Sector Plus Project, Abt Associates.

---

## Find us

[SHOPSPlusProject.org](https://SHOPSPlusProject.org)   

Sustaining Health Outcomes through the Private Sector (SHOPS) Plus is a five-year cooperative agreement (AID-OAA-A-15-00067) funded by the United States Agency for International Development. The project strategically engages the private sector to improve health outcomes in family planning, HIV, maternal and child health, and other health areas. Abt Associates implements SHOPS Plus in collaboration with the American College of Nurse-Midwives, Avenir Health, Broad Branch Associates, Banyan Global, Insight Health Advisors, Iris Group, Population Services International, and the William Davidson Institute at the University of Michigan. This brief is made possible by the support of the American people through USAID. The contents are the sole responsibility of Abt Associates and do not necessarily reflect the views of USAID or the United States government.



Abt Associates Inc.  
6130 Executive Blvd  
Rockville, MD 20852 USA  
Tel: +1.301.347.5000

October 2021