

Woinshet Negatu, Nadia Olson, Ariella Bock, and Karlan Jankowski

## Background

Since 2003, USAID and its partners have supported family planning (FP) market segmentation studies to help understand use, demand, and provision of contraceptives in the total market. Historically, however, stakeholders have not used the studies to define and implement strategies that can increase access to contraceptives. Recently, a participatory approach that builds local ownership of the data, and shares contraceptive market data among stakeholders, has shown promising results. With assistance from the USAID | DELIVER PROJECT, Ethiopia, Honduras, and Nicaragua developed and tested a participatory market analysis methodology to analyze the current and future national FP market and identify ways to improve contraceptive availability. The methodology combines demographic data analysis with provider supply data to help policymakers understand the contraceptive market and find ways to strengthen, expand, and sustain the market, over time. This interactive six-step process works to maximize each provider's ability to serve various market segments.

A total market approach works to engage all sectors (public, private and commercial) so that the public and nonprofit sectors provide subsidized services for needy consumers while maintaining sustainable commercial provision for consumers who are able to pay (Barnes 2012).

In November 2012, to improve Ethiopia's FP program and help implement its Reproductive Health Commodity Security Strategy, the project and the FMOH initiated a participatory approach to market analysis. It began with a two-day multisectoral workshop—Expanding Supply and Demand for Family Planning Services: A Key to Achieving Health and Development Goals in Ethiopia.

## Methodology

The participatory market analysis process includes—

1. Analyzing demand and provision of contraceptives in the total market among key demographic characteristics—residence, wealth, age, region, and education—using the 2005 and 2011 Ethiopia Demographic and Health Surveys (EDHS) data
2. With stakeholders at a multisectoral workshop, disseminating and validating key findings from desk-based analysis
3. Mapping supply-side data from multiple service providers and FP stakeholders
4. Prioritizing major FP issues using data from analysis and supply-side and service statistics
5. Identifying market niches, by institution and organization
6. Developing new strategies and an implementation plan for launching a total market approach.

## Ethiopia Program Intervention

The Federal Ministry of Health (FMOH) in Ethiopia works to improve the reproductive health of women, men, and young people by increasing access to quality FP services and contraceptives.

## Results

Key findings from the EDHS analysis include—

Figure 1: Ethiopia Achievements in Expanding Access to Family Planning Service (for Women in Union and Those Sexually Active)

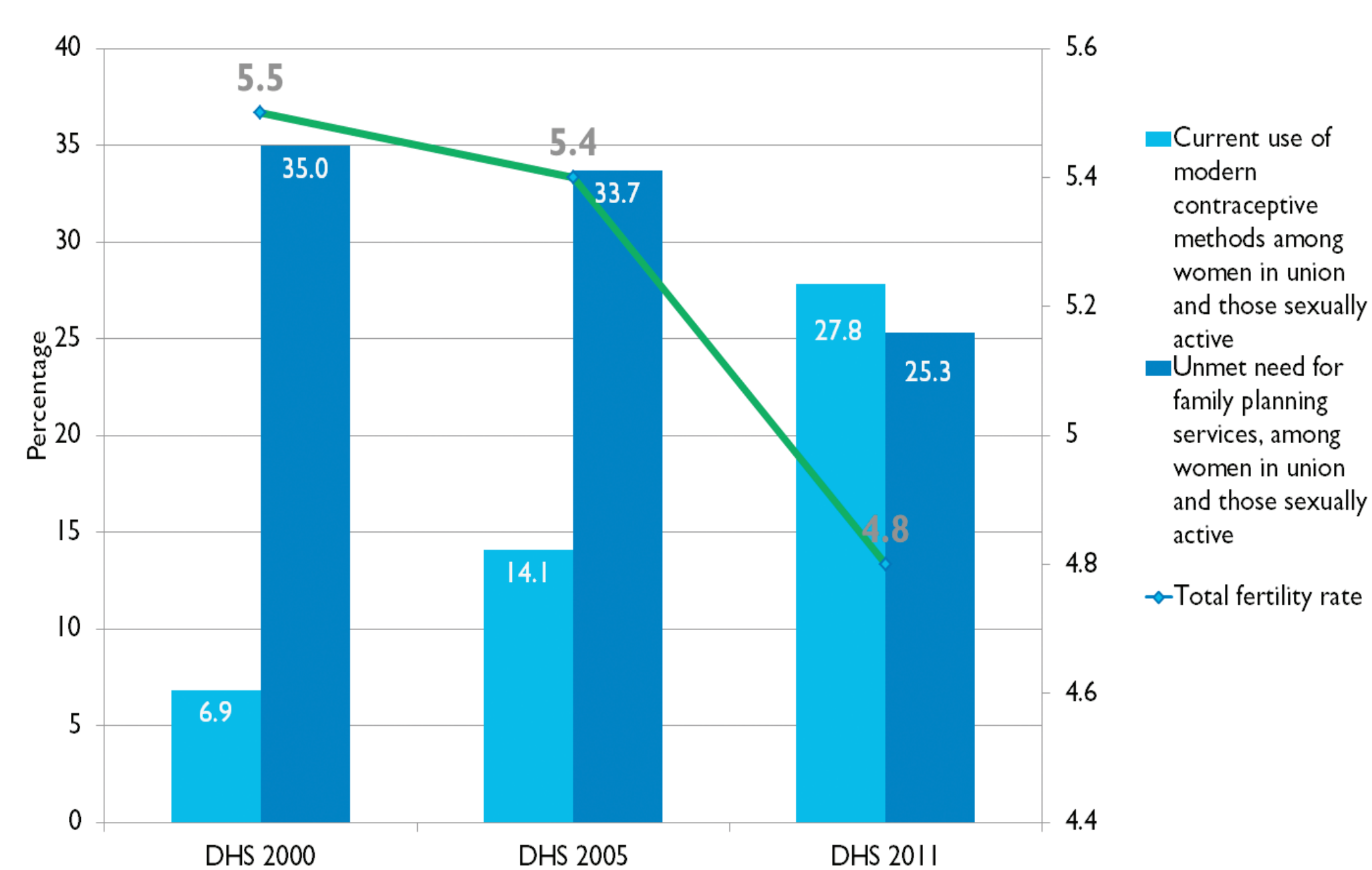


Figure 3: Source of Supply by Wealth for Women in Union and Those Sexually Active, 2011

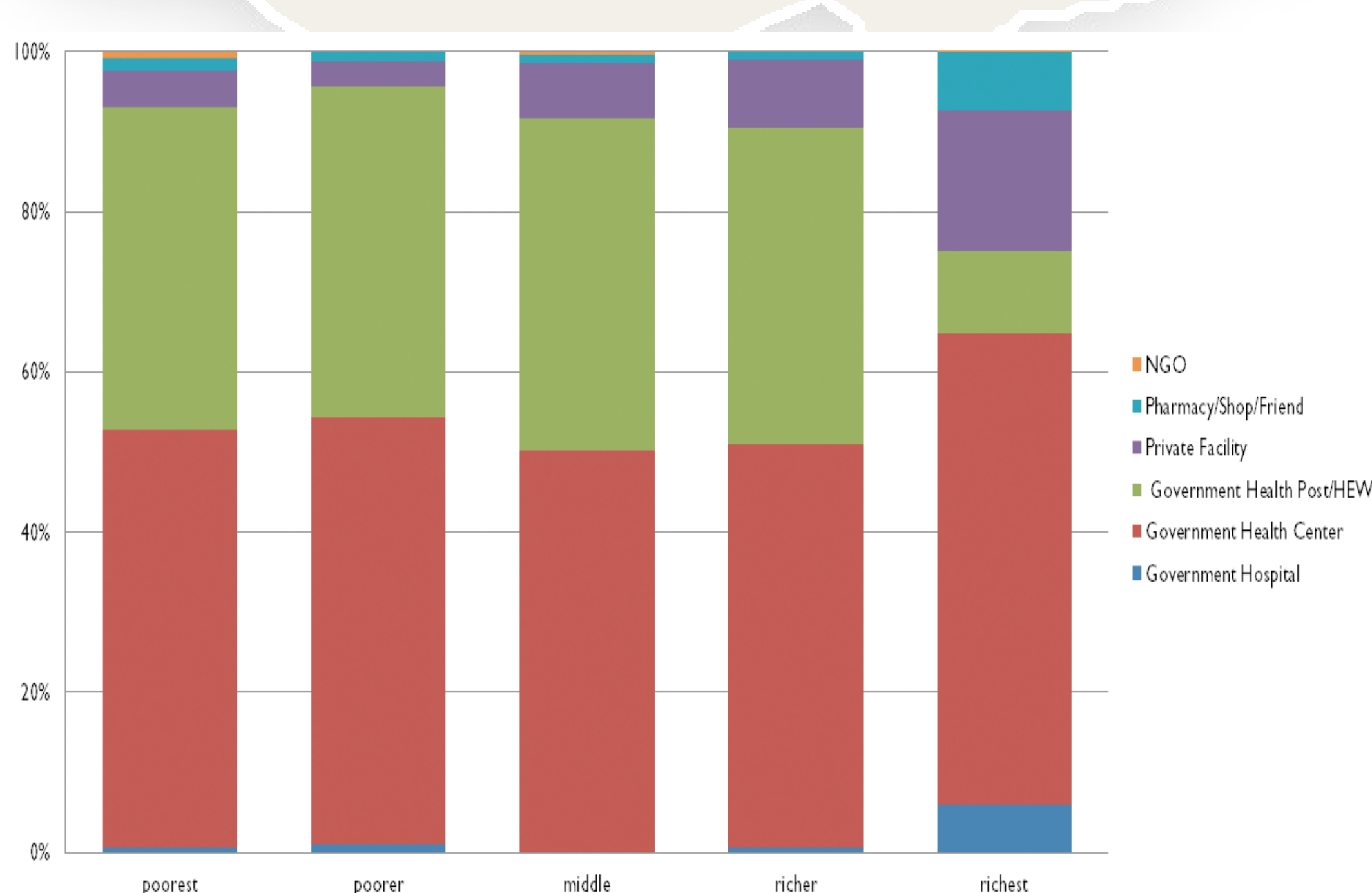


Figure 2: Contraceptive Prevalence Rate by Region for Women in Union and Those Sexually Active 2005–2011

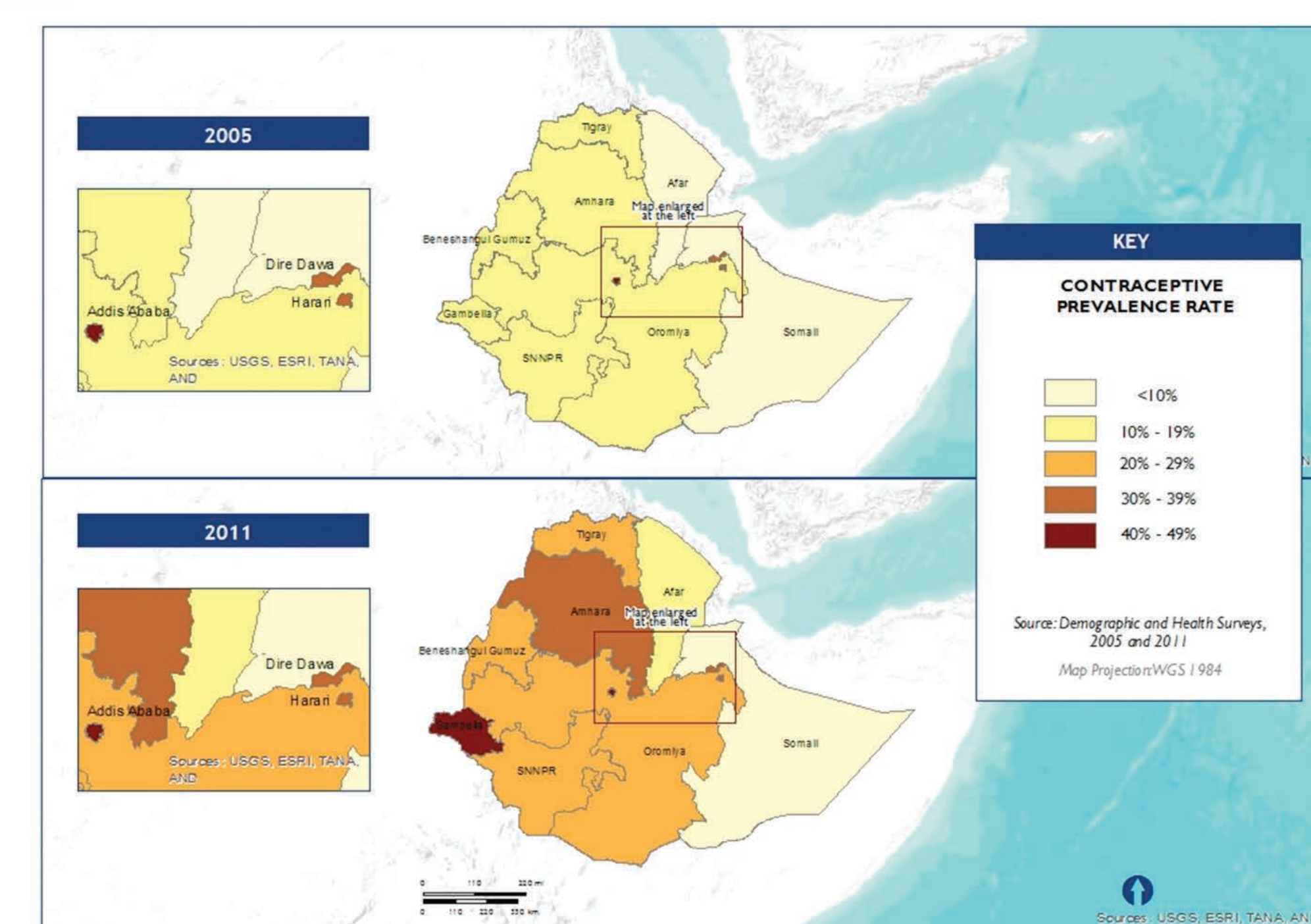


Table 1: Contraceptive Methods and Brands Provided According to Source Program, 2012

Method	FMOH <sup>1</sup>	DKT <sup>2</sup>	FGAE <sup>3</sup>	MSI <sup>3</sup>	Other Private Sector <sup>4</sup>
Orals	Microgynon Lynestrenol <sup>b</sup> Microlut	Choice I plan Hyan Style <sup>b</sup> Post Pill	Microgynon Lynestrenol <sup>b</sup> Microlut	Microgynon Lynestrenol <sup>b</sup> Microlut Choice I plan Hyan Style <sup>b</sup> Post Pill	Choice I plan Hyan Style <sup>b</sup> Post Pill
Injectables	Depo-Provera Petogen Megestron Depogestin	Confidence <sup>c</sup>	Depo-Provera Petogen Depogestin	Depo-Provera Petogen Depogestin	Confidence <sup>c</sup>
Condoms	Standard (not branded) Hiwot trust	Hiwot trust Sensation Members only	Standard Hiwot Trust Sensation	Standard Hiwot trust Sensation	Hiwot trust Sensation Members only
Implants	Implanon Trust Implant <sup>d</sup> Jadelle Sino Implant II	Trust Implant <sup>d</sup>	Jadelle Implanon	Jadelle Implanon Trust Implant <sup>d</sup> Sino Implant II	Trust Implant <sup>d</sup>
Intrauterine devices	Copper T380A Long Act	Long Act U-Kare	Copper T380 A	Copper T380A Long Act	Long Act U-Kare

1. Public Sector 2. Social Marketing 3. Private NGOs 4. Commercial Clinics and Pharmacies  
Generic brand name: a. Exluton b. Trigestrel c. Depogestine d. Sino Implant

By exploring key findings in the workshop, participants—

- better understood clients' preferences, gaps in provision, and need to use data to target underserved populations—e.g., urban youth and pastoralist populations
- affirmed the importance of including the private sector more
- committed the FP technical working group to better coordinate service provision.

## Program Implications/Lessons

In-depth market analysis, with a participatory approach to action planning, can help ensure stakeholder—

- ownership and use of market analysis information
- commitment to a total market approach.