SCALABLE MALARIA VECTOR CONTROL MEETING (WIN)

Basel, Switzerland

24 – 26 October, 2007
NetMark Overview

- **Goal**: Contribute to global malaria burden reduction objectives => establishment of sustainable African commercial markets for high quality, affordable ITNs/LLINs

- **Strategy**: joint risk-joint investment partnerships with multi-national and African commercial sector

- **Duration**: 10 years (Sept. ‘99 - Dec. 2009)

- **Funding ceiling**: $65.4 million
Sustainable Malaria Prevention

Increase ITN Usage

Coordination
- New Technology Development/Quality Assurance
- Market Research
- Distribution Support/Marketing Funds
- Financing
- Policy/Advocacy
- Demand Creation/Matching Funds
- Targeted Subsidies Vouchers

PRIVATE SECTOR
- Product
- Place
- Price
- Promotion

Sustainable Markets

PUBLIC SECTOR
- Supply
- Distribution
- Affordability
- Demand/Appropriate Use
- Equity

Increase ITN Usage

Sustainable Malaria Prevention
Demand Creation
Supply

Stock

Wholesale

Direct to Retail
Equity and Market Priming: Targeted Subsidies

Nigeria

Ethiopia
Policy Development & Advocacy Support
Completely removed TT
No TT on ITNs/LLINs but still have on insecticides
Reduced TT on ITNs/LLINs but not on insecticides
NM engaged in TT policy change dialogue
TT removed before NetMark (1999)

Nigeria is special!
Monitoring, Evaluation and Research
MER
## NetMark Household Surveys

<table>
<thead>
<tr>
<th>Country/Sites</th>
<th>Activities began</th>
<th>Baseline Survey</th>
<th>Midline Survey</th>
<th>End-line Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Zambia:</strong> Lusaka, Choma, Kaoma, Kitwe Mansa</td>
<td>2001</td>
<td>2000</td>
<td></td>
<td>2004</td>
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<tr>
<td><strong>Uganda:</strong> Kampala, Masaka, Soroti, Hoima, Mbarara</td>
<td>2003</td>
<td>2000</td>
<td>2006</td>
<td>2008?</td>
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<tr>
<td><strong>Senegal:</strong> Dakar, Thies, St. Louis, Kaolack, Tambacounda</td>
<td>2002</td>
<td>2000</td>
<td>2004</td>
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<td><strong>Nigeria:</strong> Lagos, Ibadan, Kano, Maiduguri, Nsukka</td>
<td>2002</td>
<td>2000</td>
<td>2004</td>
<td>2008</td>
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<tr>
<td><strong>Mozambique:</strong> Maputo, Beira, Quelimane, Tete, and Nampula</td>
<td></td>
<td>2000</td>
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<tr>
<td><strong>Mali:</strong> Bamako, Kayes, Sikasso, Segou, Mopti</td>
<td>2003</td>
<td>2003</td>
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<tr>
<td><strong>Ghana:</strong> Accra, Keta, Kumasi, Wa, Tamale</td>
<td>2002</td>
<td></td>
<td>2004</td>
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<tr>
<td><strong>Ethiopia:</strong> Bahir Dar, Nazreth, Dire Dawa, Dessie, Awasa</td>
<td>2004</td>
<td>2004</td>
<td></td>
<td>2008?</td>
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</tbody>
</table>
### Other research activities

<table>
<thead>
<tr>
<th>Country</th>
<th>Omnibus survey</th>
<th>Retail Audit</th>
<th>Targeted subsidy evaluation</th>
<th>Other research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zambia</td>
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<td>Uganda</td>
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<td>ongoing</td>
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<td>Qualitative research of likelihood of purchase after first trial</td>
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<tr>
<td>Ghana</td>
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<tr>
<td>Ethiopia</td>
<td></td>
<td></td>
<td></td>
<td>Qualitative research of likelihood of purchase after free trial</td>
</tr>
</tbody>
</table>
Strengthening African Net & ITN Production:

- Improving Production
- Developing New Products
  - ITN Bundling through Open Market Traders
  - Linking yarn, net, insecticide & stitcher groups
Transferable LLIN Process: AED/Bayer/TANA (ABT)

Mass treatment of finished nets
Environmentally & worker friendly
Scalable to company’s needs
Off-the-shelf, reliable equipment
Process available to all companies
Can be stand-alone operation

TANA factory up and running
WHOPES Phase II to be completed in August 2007?; recom. in Dec/Jan 08
ABT to help MossNet/Kenya produce DawaPlus
Developing trend towards polyethylene nets for durability, leaving uncertainty for polyester net production.

Donors using WHOPES as THE requirement for tender bidding.

New LLINs facing financial stress while awaiting WHOPES for 2 years after setting up production line.

Quality Assurance: still an issue for African net production and will be bigger issue for LLIN production.

Quality Control: Local regulatory bodies lack capacity to test LLINs.
Tech Transfer Activities 06/07

- **Feasibility studies:** 4 Tanzanian companies with PSI; Ethiopia; facilitation of IFC and Tana support to Mossnet/Kenya

- **Tech Support:** advice on stitching operations & LLIN process to Ghana, Kenya, Madagascar, Cameroon, Malawi, Nigeria, Tanzania, Uganda, Zimbabwe, India, Philippines, Indonesia, Honduras

- **R&D:** Several formulas being tested: treatment processes continually being updated to double/triple output

- **LLIN/DAWA PLUS Production:** Tanzania running, Nigeria, Senegal, Ethiopia and Angola in preparation to run in 2008

- **LLIN Financing:** discussions with IFC, ExxonMobil, USAID/Tanzania; concept paper to GDA/Nigeria and proposal to ExxonMobil/Nigeria. Expecting results soon.
## Status of LLIN Transfer

<table>
<thead>
<tr>
<th>Company</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Sunflag Tanzania</td>
<td>Up and running</td>
</tr>
<tr>
<td>Mossnet Kenya</td>
<td>IFC funding when DawaPlus gets WHOPES</td>
</tr>
<tr>
<td>Sunflag Nigeria</td>
<td>Now expressing interest in LLINs – ready to go 2008</td>
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<tr>
<td>Ethio-Japan Ethiopia</td>
<td>Positive results from an in-depth feasibility study – ready to go 2008</td>
</tr>
<tr>
<td>AIPACS Moz/Nigeria</td>
<td>Setting up stitching in Moz; may add LLIN capacity</td>
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<tr>
<td>A-Z Textiles TZ</td>
<td>Was very interested but now quiet as TZ changes policy</td>
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<tr>
<td>Mabol Nigeria</td>
<td>Asked for quotes on equipment but no decision</td>
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<tr>
<td>Holborn Nigeria</td>
<td>Expressed interest, but has taken no steps</td>
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<tr>
<td>Bonia-Nigeria</td>
<td>Expressed interest; IFC interested in helping them</td>
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<tr>
<td>Senegal</td>
<td>Approached Bayer for collaboration for LLINs – ready to go 2008</td>
</tr>
<tr>
<td>TMTL TZ</td>
<td>NMCP/Govt? decision hurts polyester</td>
</tr>
<tr>
<td>Motex TZ</td>
<td>NMCP/Govt? decision hurts polyester</td>
</tr>
<tr>
<td>Bio-Tech-India</td>
<td>Strong interest</td>
</tr>
</tbody>
</table>
Impact and Achievements

- Creation/strengthening of six sustainable national markets
- ITN/LLIN consumer prices down 30%-70%
- Coordination of a PPP development of a transferable, environmentally-friendly LLIN technology
- Elimination/reduction of taxes and tariffs on ITNs/LLINs in target countries
- Over 50 million ITNs/LLINs sold and $42 million invested by 49 partners
External Evaluation Comments on NetMark Achievements

- “Made headway in encouraging the commercial sector to get involved in the supply, distribution and marketing of ITNs”

- “Made a real and material contribution to increasing net ownership and coverage in several countries”

- “Unequivocally successful in improving the policy environment”

- “The LLIN technology may turn out to be NetMark’s most enduring legacy” if DAWA PLUS® receives WHOPES recommendation”.
Challenges

- Need to agree on how to attribute results and measure impact. Are the indicators:
  - Formal Partner Sales?
  - FMI™ Sales?
  - Ownership?
  - Use?
  - Correct use?

- Need to define private sector niche (incremental scale up) within a SUFI environment.

- Converting “samplers” who received free nets to “purchasers” who will buy a second net or a replacement net