SCALABLE MALARIA VECTOR CONTROL MEETING (WIN)

Basel, Switzerland

24 – 26 October, 2007

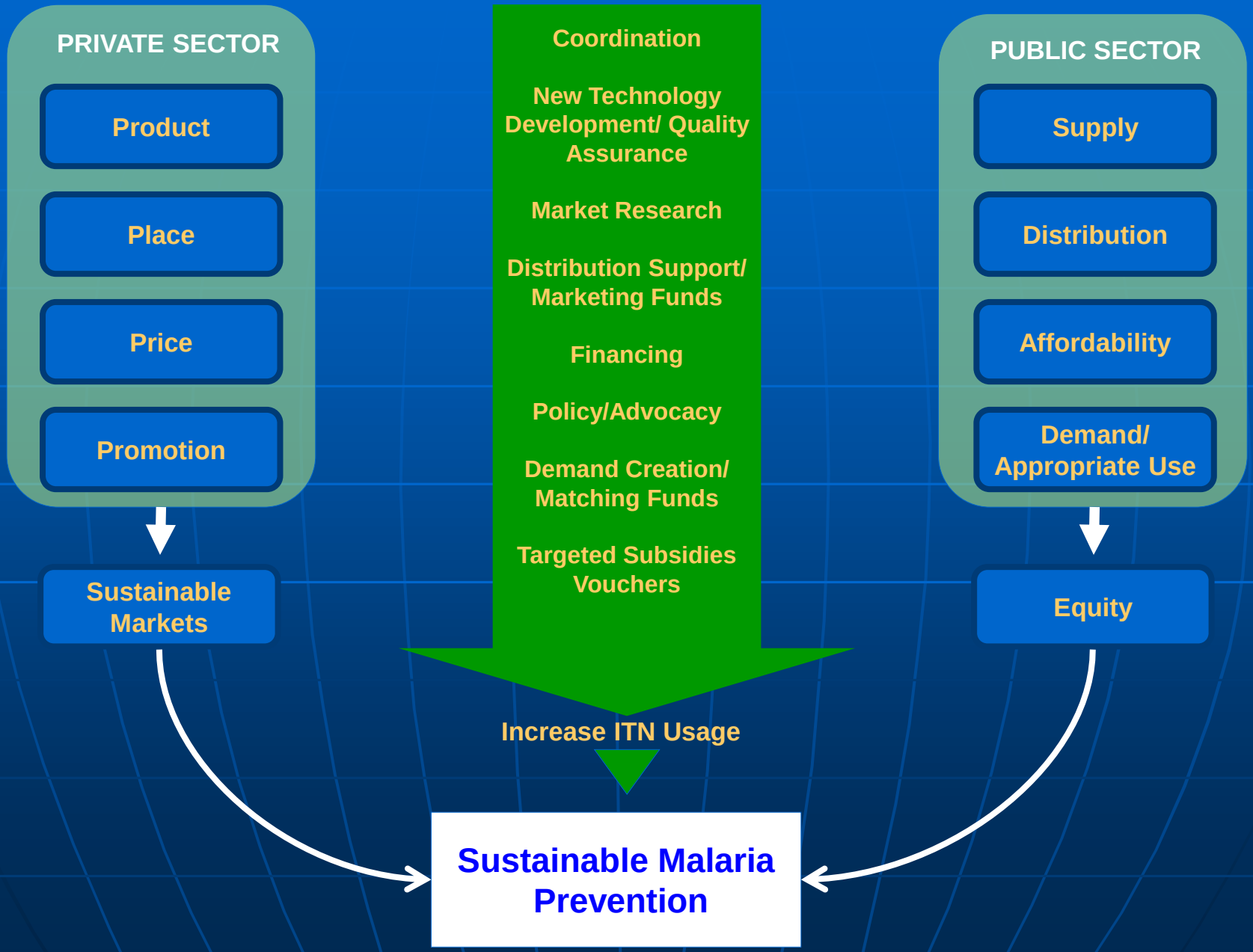
USAID
FROM THE AMERICAN PEOPLE

AED
Academy for Educational Development

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

FULL MARKET IMPACT™



Demand Creation

Supply

Stock

Wholesale

Direct to Retail

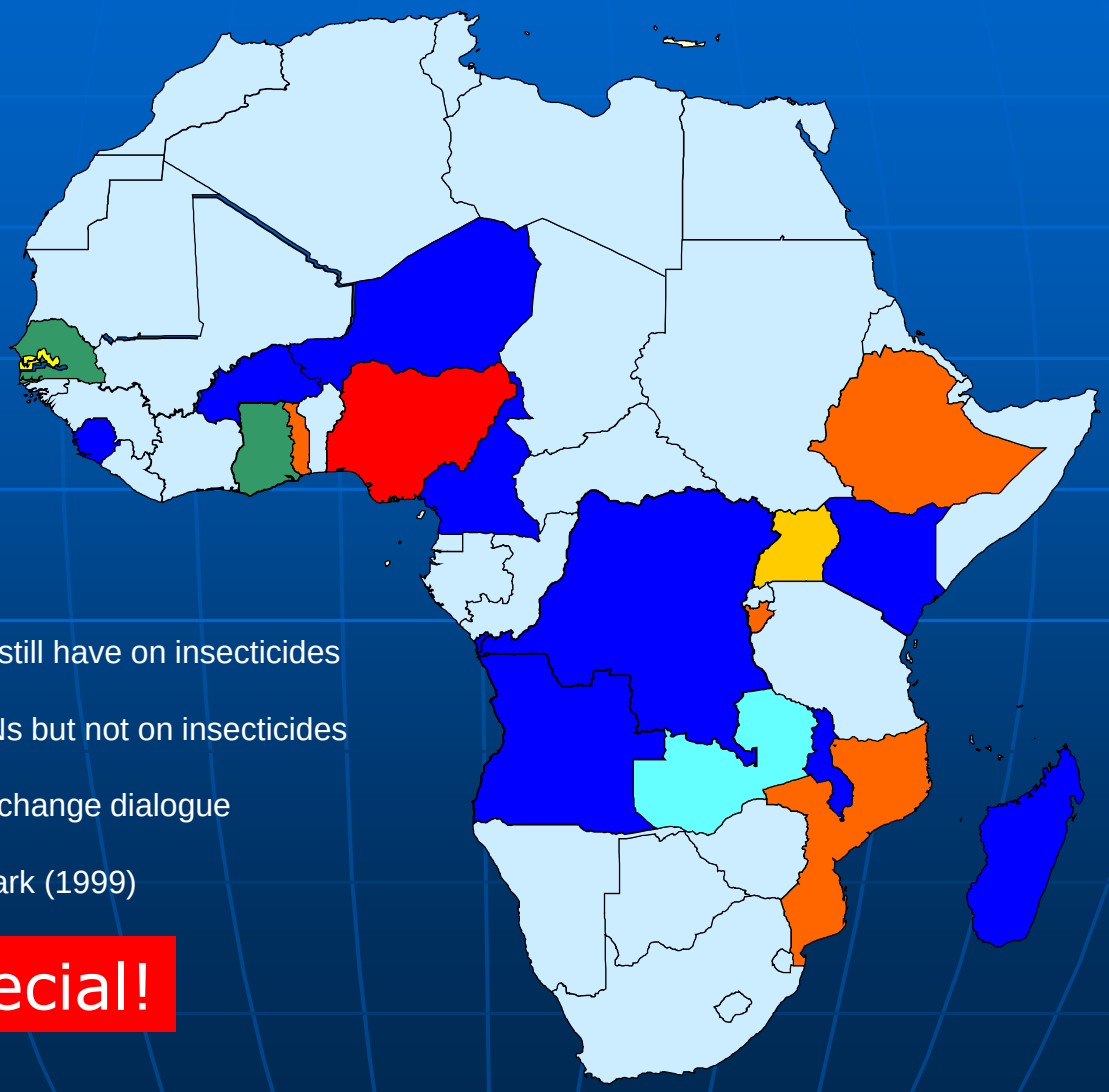
Equity and Market Priming: Targeted Subsidies

Nigeria

Ethiopia

Policy Development & Advocacy Support

NetMark Taxes and Tariffs Advocacy Results



- 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

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

Other research activities

Country	Omnibus survey	Retail Audit	Targeted subsidy evaluation	Other research
Zambia				
Uganda		ongoing		Qualitative research of likelihood of purchase after first trial
Senegal				
Nigeria	ongoing			Qualitative research of likelihood of purchase after first trial
Mali				
Ghana				
Ethiopia				Qualitative research of likelihood of purchase after free trial

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

Tech Transfer Issues

- 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

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

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**