ANTIMALARIAL MARKET IMPROVEMENTS IN CAMBODIA FROM 2009 TO 2015

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BACKGROUND
Key strategies have been implemented in Cambodia to address the threat of artemisinin drug resistance and to achieve malaria elimination. These include scale-up of a Village Malaria Worker (VMW) program, and increased private sector regulation and engagement.

METHODS
Nationally representative malaria outlet surveys were conducted in 2009, 2011, 2013 and 2015. A census of public and private outlets with potential to distribute malaria testing and/or treatment was conducted among a representative sample of administrative units. An audit was completed for all antimalarials and malaria rapid diagnostic tests (RDT), and information was also gathered on malaria microscopy.

RESULTS
Have antimalarial stocking practices changed in recent years? Within the public sector, data trends suggest declines in antimalarial availability in public health facilities and among VHWs since 2011, such that in 2015 availability in facilities was 78% and among VHWs, 74%. There have been declines in antimalarial availability among all private sector outlet types since 2009. In 2015, antimalarials were available in approximately one-third of private health facilities (31%), 21% of pharmacies, 7% of drug stores and 19% of itinerant drug vendors (Figure 1).

Where antimalarials are distributed, is confirmatory testing available? Availability of confirmatory testing, either by malaria RDT or microscopy, remained high over time in the public sector. In 2015, over 90% of antimalarial-stocking public health facilities had testing available. In 2015, 65% of private sector outlets with antimalarials had confirmatory testing available, including over 80% of private health facilities and 70% of pharmacies.

Do private sector outlets engaged in malaria testing and treatment receive support from government or non-government organizations? Nearly half of private sector outlets providing malaria testing and/or treatment reported receiving one or more types of support including subsidized commodities, training, supervision, and/or caseload data reporting (Figure 5).

What types of support do private sector outlets receive? The most common types of support reportedly received were access to subsidized antimalarials (58%), subsidized RDTs (63%), and case management training within the past year (59%). Supervisory visits were less commonly reported (21%) (Figure 6).

CONCLUSION
Repeat outlet surveys in Cambodia demonstrate the success of public and private strategies to improve case management. VMWs are now a common service delivery point for antimalarial treatment, and the role of the informal unregulated private sector in malaria case management has declined over time. The private sector still accounts for the majority of antimalarial distribution. In 2015, nearly half of private sector outlets providing malaria testing and/or treatment reported receiving some sort of support or engagement by government or non-government organizations, such as training or access to subsidized commodities. Given the current role of the private sector in antimalarial distribution in Cambodia, there is need to scale up support and to ensure suspected malaria cases are tested and treated according to national guidelines.

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Figure 1: Availability of any antimalarial on the day of the survey. Among all screened outlets [All outlets: 2009 N=7,513; 2010 N=17,920; 2013 N=15,755; 2015 N=26,664]

Figure 2: Antimalarial market composition by outlet type Among outlets with at least one antimalarial in stock [2009 N=652; 2011 N=1,007; 2013 N=782; 2015 N=858]

Figure 3: Antimalarial market share Relative market volume (sale/distribution) of antimalarials

Figure 4: Availability of malaria blood testing. Among outlets stocking antimalarials on the day of the survey or in the past 3 months [All Outlets: 2009 N=887; 2011 N=1,516; 2013 N=1,338; 2015 N=1,132]

Figure 5: Percentage of private sector outlets that report receiving any type of support. Among outlets with testing or treatment in stock on the day of the survey or in the past 3 months [Private Total=N=727]

Figure 6: Types of support reportedly received by private sector outlets. Among all outlets reportedly receiving support [N=264,268]